

FTSE 環境オポチュニティ日本株指数について

概要

成長が見込まれる環境セクターへの投資をサポートするツールとして設計

- FTSE 環境技術委員会の指揮のもと、2007 年に Impax Asset Management 社と共同で環境技術の開発と普及をビジネスとする企業を評価する指数を開発
- グローバルスタンダードに合わせた環境セクターの定義、及びFTSEならではの投資対象の厳格なインデックス組み入れ基準を適用

選定対象

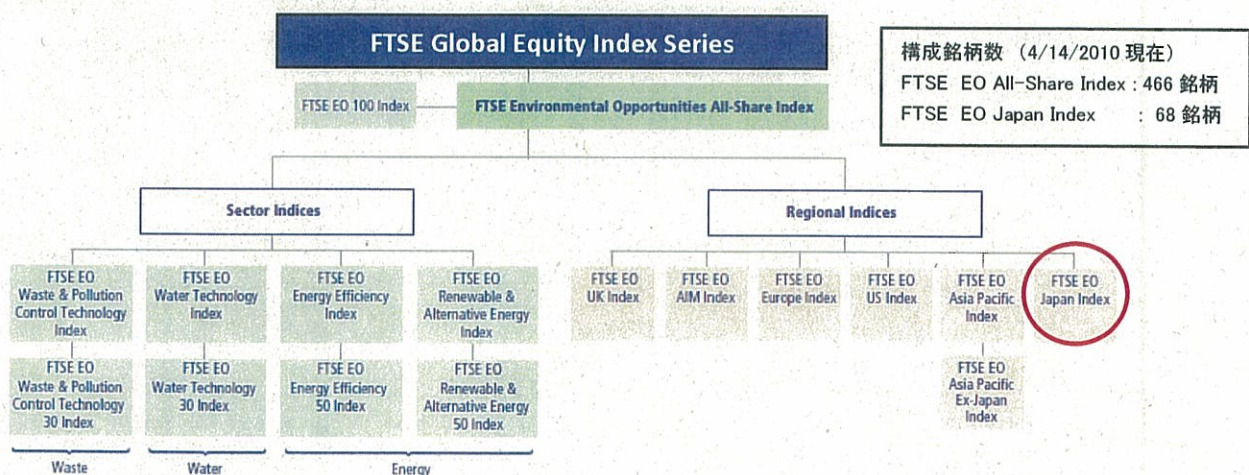
- 世界 48 カ国、98%の時価総額をカバーする FTSE グローバル株式インデックス (GEIS) に含まれる東証 1 部・2 部、大証 1 部上場企業が対象
 - GEIS は
 - 世界中の投資家が投資可能なあらゆる株式を網羅
 - 不動産調整と流動性のスクリーニング

構成銘柄の選定

上記の対象企業より以下の環境技術にフォーカスをあて、その事業収益が **20%**を超える企業を選出し「FTSE 環境オポチュニティ日本株指数」を構成

- 代替エネルギーおよびエネルギー効率 (例: 風力タービン、太陽光発電技術)
- 水処理技術および公害防止 (例: ろ過、浄水および膜分離技術)
- 廃棄物処理技術および資源管理 (例: 再生材を使用した製造技術)

FTSE 環境オポチュニティ・インデックスのシリーズ構成



指数の保守

- 構成銘柄の見直しを定期的に行い、適格性を確保
- 指数構築ルールを公表し、透明性を確保
- 指数データは毎日更新し、利用者に提供

FTSE ENVIRONMENTAL OPPORTUNITIES INDEX SERIES

The FTSE Environmental Opportunities Index Series measures the performance of global companies that have significant involvement in environmental business activities, including renewable & alternative energy, energy efficiency, water technology and waste & pollution control.

Forming part of the overall FTSE Environmental Markets Index Series, the FTSE Environmental Opportunities Index Series requires companies to have at least 20% of their business derived from environmental markets and technologies (as opposed to at least 50% for the FTSE Environmental Technology Index Series).

The FTSE Environmental Markets Index Series has been developed in collaboration with Impax Asset Management and under the direction of the independent FTSE Environmental Technology Committee, further enhancing FTSE's suite of Responsible Investment indices and providing investors with a robust set of responsible investment tools.

The two headline indices within the FTSE Environmental Opportunities Index Series are:

FTSE Environmental Opportunities All-Share Index

The headline benchmark index, comprising all of the companies that have significant involvement in environmental business activities and meet the environmental opportunities eligibility requirements*

FTSE EO 100 Index

The headline tradable index, focusing on the top 100 largest companies by market capitalisation in the FTSE Environmental Opportunities All-Share Index*

*See FTSE Environmental Opportunities Index Series criteria factsheet for further details on inclusion requirements

MEETING THE NEEDS OF RESPONSIBLE INVESTORS

Investment products based on the FTSE Environmental Markets Index Series will appeal to a broad range of institutional and retail investors who are looking to:

- Invest in environmental markets via an investable and transparent FTSE index
- Maximise environmental growth opportunities within their portfolios
- Invest in companies that are best placed to succeed in a future low carbon environment
- Support the growth and development of environmental markets

FEATURES

- The FTSE Environmental Opportunities Index Series features within the overall FTSE Environmental Markets Index Series
- The FTSE Environmental Opportunities Index Series comprises a broad range of indices including the FTSE Environmental Opportunities All-Share Index, FTSE EO 100 Index and a range of specific indices focused on the major environmental markets of renewable and alternative energy, energy efficiency, water technology and waste and pollution control
- The index is designed for the creation of derivatives, index tracking funds and ETFs
- Stocks are free-float weighted to ensure that only the investable opportunity set is included within the index
- Stocks are liquidity screened to ensure that the index is tradable
- Capital and total return indices are available for this index

ABOUT IMPAX ASSET MANAGEMENT

Impax is a specialist investment manager in the environmental sector with over US\$1.9 billion under management across a range of funds investing in quoted securities and private equity.

The firm was founded in 1994 as a specialist finance house focusing on the markets for cleaner or more efficient delivery of basic services of energy, water and waste. These markets are expanding rapidly, as business and political leaders encourage the development of cleaner products and services in response to the increasing pressures placed on the environment.

Impax's dedicated team of professionals, with many years of experience in the financial and environmental sectors, is ideally placed to understand and take advantage of the investment opportunities arising from these growing markets.

For more information, please visit www.impax.co.uk

FTSE ENVIRONMENTAL OPPORTUNITIES INDICES FAMILY TREE

