

2016/2017 Case Details: PHASE I

Overview:

Welcome to the Business for a Better World Case Competition. Your challenge is this:

Design a global equity portfolio that advances the United Nations' Sustainable Development Goals while also maximizing returns.

Just over a year ago, over 150 world leaders adopted the new *2030 Agenda for Sustainable Development*. The Agenda is a plan of action for “people, planet and prosperity” and includes the 17 Sustainable Development Goals (SDGs). The SDGs build on the 8 Millennium Development Goals from 2000 and the goals balance the three dimensions of sustainable development: the economy, society and environment. The 17 SDGs are accompanied by 169 specific targets that make the agenda actionable and able to be monitored. The Goals aim to stimulate action over the next 15 years in areas of critical importance for humanity and society.

Active participation from the private sector will be necessary to meet the UN’s ambitions objectives. With increasing demand for socially responsible or ethical investing, a portfolio that aligns with the United Nations’ SDGs could create positive impacts for society in addition to being a successful financial product.

We recognize that the SDGs are broad and so we don’t expect teams to address all of the 17 goals. Teams are encouraged to narrow in on specific aspects of the SDGs so long as they explain how and why they have chosen to do so.

We encourage you to tackle this case with creativity, critical thinking and, where possible, use quantitative analysis.

Good luck!

Phase I requirements:

The Phase I submission should contain at least the following:

- A description of the critical trends in the sustainable investing environment.
- Identification of the SDGs being promoted by your portfolio. Your team should outline key focus areas and explain why you have focused on these aspects. In addition, provide an outline of the objectives of your portfolio (including both SDG-related and financial objectives).
- An overview of the team’s methodology for delivering on the key objectives.
 - Teams should include an explanation of the ESG information/data being used and its source/provider (e.g. Bloomberg ESG data, traditional financial reports, sustainability reports, CDP, Forest 500, Carbon Clean 200, etc. – possible sources are endless!)
 - Optional: Teams may also provide information on how their methodology specifically relates to pre-existing frameworks other than the SDGs (e.g. SASB, Integrated Reporting, etc.)
- A discussion of the other potential positive and negative impacts, if any, resulting from the proposed portfolio.
- Select a chosen benchmark for comparing your portfolio.

- Where necessary, teams should define key terms.
- Optional: Sales strategy and target market for the portfolio (teams that make it to Phase II will be required to expand on this).

The idea is to consider this case competition as a real-life scenario. Teams are therefore encouraged to consider the feasibility of their proposal and think through the potential implications from the political environment, social and environmental considerations, the level of technology, and financial resources and outcomes. Teams are also encouraged to provide quantitative data to support their approach, the CleanCapitalist Tool (discussed below) in some cases may help with this.

For this case, we have not set many specific parameters of the scenario, so where appropriate your team may choose to define its own scenario to provide context and allow for deeper analysis.

Format:

Any submissions that do not follow the format outline below will be penalized but still considered. First Round Submissions must arrive as a Microsoft PowerPoint presentation of no more than 10 slides (or the equivalent converted to PDF).

The presentation can include a combination of supporting text, charts and images, but this must be included as part of 10-slide limit.

Use of appendices: Teams may provide additional information in the form of appendices *only* to the extent that they support the main material presented in the body of the submission. The 10-slides should be able to stand alone, if needed.

IMPORTANT REQUIREMENT: To avoid potential conflict of interest amongst judges, please do not include your school name or the names of your team members on the presentation slides.

Corporate Knights' CleanCapitalist Portfolio Tool:

The beta version of Corporate Knights CleanCapitalist Portfolio Tool is an online tool that can be used to determine an equity portfolio's carbon footprint, exposure to "green" and fossil fuel intensive companies, gender equality, economic inequality and a collection of other sustainability factors.

This tool may assist your team with in the quantitative research and analysis for the case.

The *Key Contact* on registered teams will be given log-in credentials for the tool. Once you receive the login, if your team has questions about the tool, do not hesitate to contact us at mbacontest [at] corporateknights.com.

Deadline:

October 28 (5 p.m. EST).

Submission to be sent by email attachment to: Mbacontest [at] corporateknights.com

Useful Links & Resources:

- It's up to business to take the big next step on the SDGs
<http://go.greenbiz.com/I0h0oNh0TqoNVS090K0JY00>
- Sustainable Development Goals:
<https://sustainabledevelopment.un.org/sdgs>
- Transforming our world: the 2030 Agenda for Sustainable Development
<https://sustainabledevelopment.un.org/content/documents/21252030%20Agenda%20for%20Sustainable%20Development%20web.pdf>
- MSCI ESG Research
<https://www.msci.com/research/esg-research>
- Sustainability Accounting Standards Board
<http://www.sasb.org/>
- CDP
<https://www.cdp.net/en>