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## **Responsible finance: the AMF draws an overview of communications practices abroad**

**The Autorité des Marchés Financiers (AMF) has reviewed the main responsible investment (RI) offerings proposed to private individuals in various European and third countries, as well as the communications practices of banks regarding these investments. The results show that the websites of the major banks do not give much prominence to responsible financial products for retail clients.**

This qualitative study is based especially on observations of over 80 public websites of banks (i.e. excluding user areas accessible only to customers) made between 2020 and the beginning of 2021.

The overview shows a wide variety of approaches: some markets, particularly in the European Economic Area, are targeting more at retail investors, while in other countries the offering aims above all at institutional investors. Some websites do not mention responsible investment, or do so only in the institutional presentation page of the company, or in the private banking section. Others communicate more widely on the subject but do not go into detail about their fund offerings.

Other institutions stand out for their educational communication initiatives, making available different content, videos, podcasts, etc., to explain the main concepts of responsible finance, detailed descriptions of company evaluation methods and tools to select funds based on specific criteria.

Providing investors with clear information on responsible and sustainable finance and environmental, social and governance (ESG) criteria is essential to improve confidence in this type of investment. Under the new MiFID2 rules, as of August 2022, financial advisors will be required to obtain their clients' ESG preferences before offering them an investment product.

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International Overview of Responsible Investment Communications Practices -  
September 2021

### Keywords

- SAVINGS PROTECTION
- COLLECTIVE INVESTMENTS

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