



## **ASSESSMENT REPORT**

**2021 PILOT**

**Swiss Life Group**

**Generated 2022-08-18**

## ABOUT THIS REPORT

The assessment report is designed to provide feedback to signatories and support ongoing learning and development. The high-level assessment methodology can be found [here](#) and question-level assessment criteria can be found after each indicator in the Investor Reporting Framework, [here](#). Note that the 2021 scoring methodology has changed to reflect the new Reporting Framework, and is incomparable with scores from previous PRI years.

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A dataset of medians based on all signatories' scores can be referenced [here](#).

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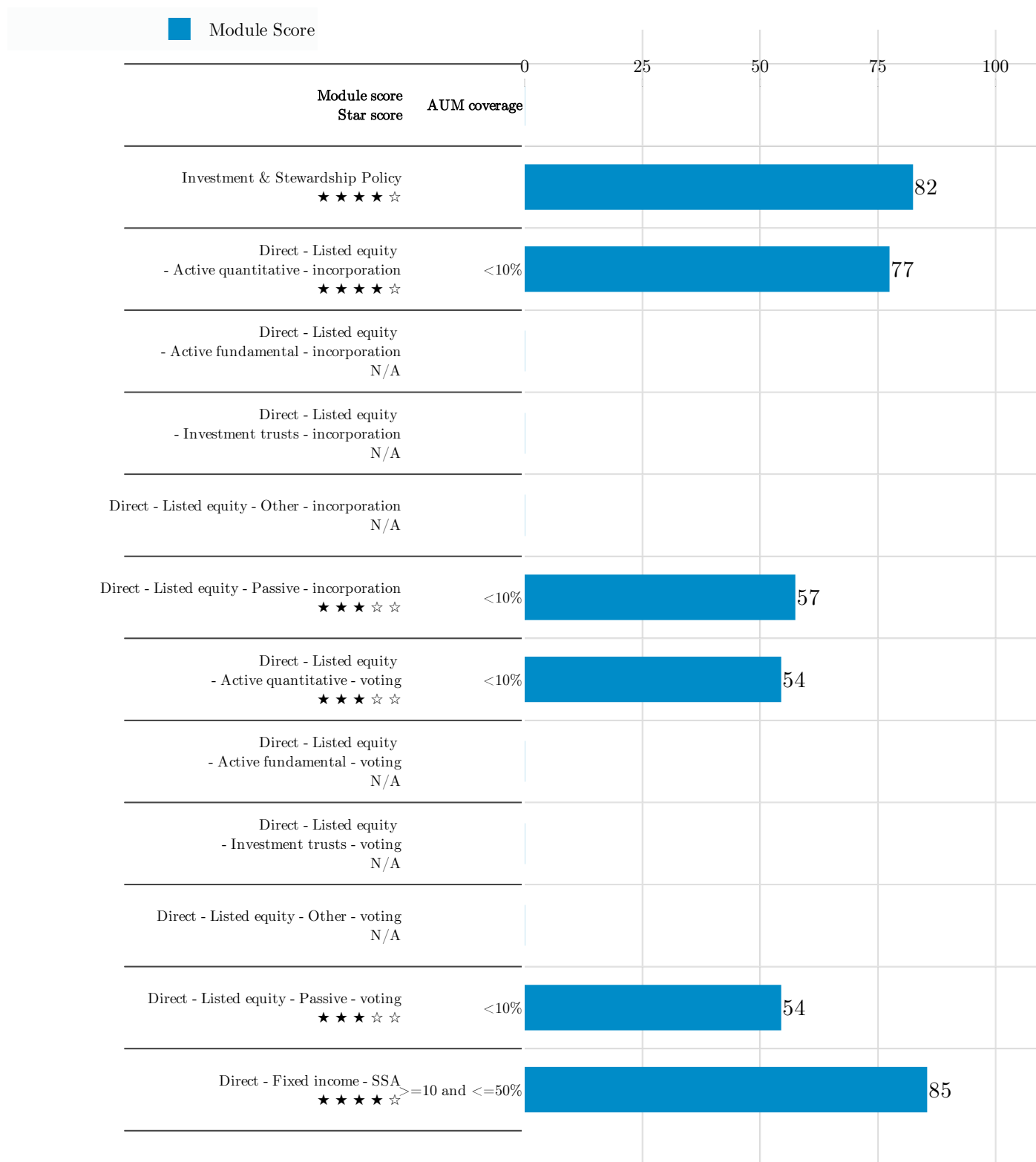
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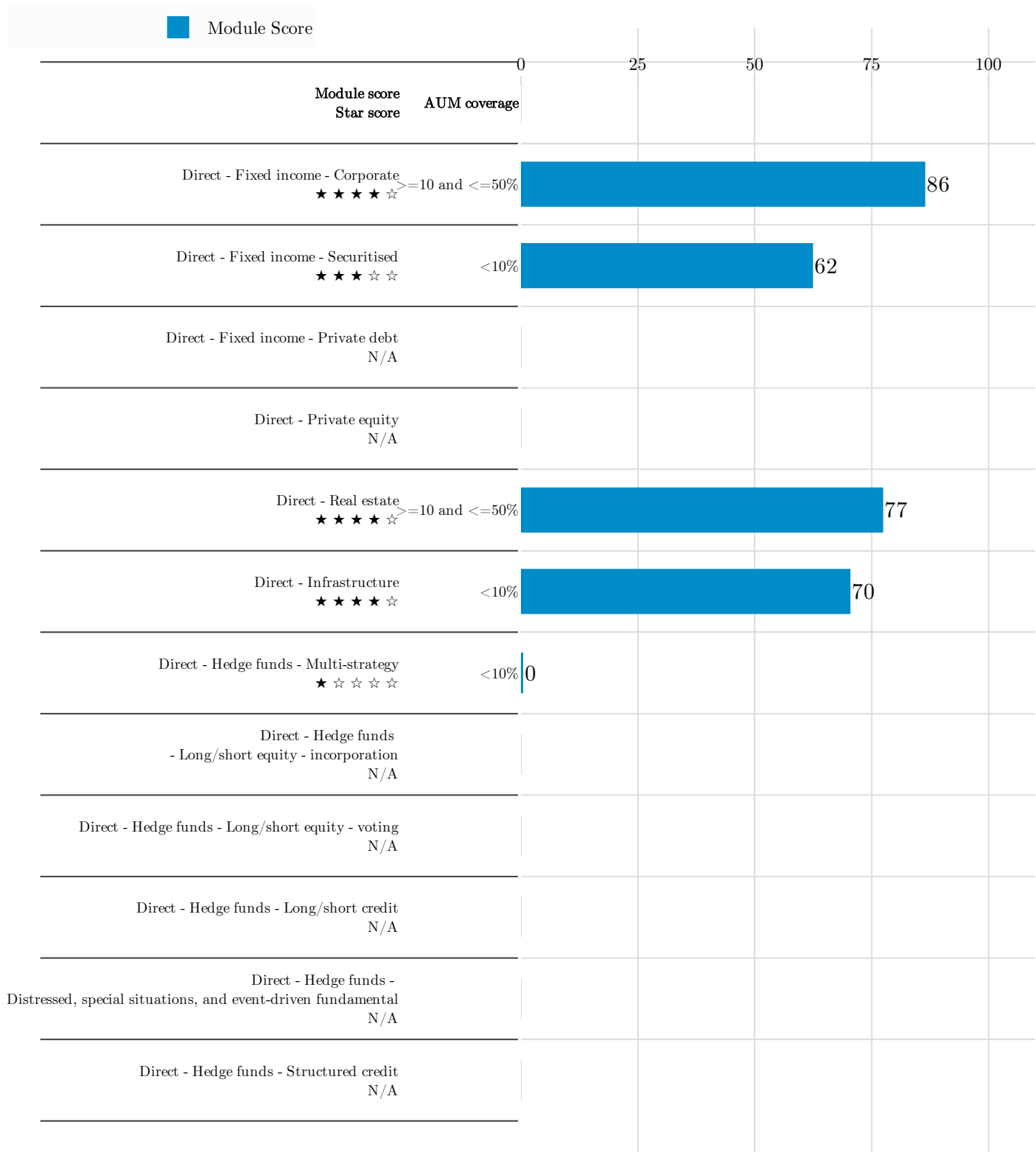
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# Summary Scorecard



## Summary Scorecard (continued)



## Summary Scorecard (continued)

■ Module Score

	0	25	50	75	100
Module score Star score	AUM coverage				
Direct - Hedge funds - Global macro N/A					
Direct - Hedge funds - Commodity trading advisor N/A					
Direct - Hedge funds - Other N/A					
Indirect - Listed equity - Passive N/R					
Indirect - Listed equity - Active N/R					
Indirect - Fixed income - Passive N/R					
Indirect - Fixed income - Active N/R					
Indirect - Private equity ★☆☆☆☆	<10%				
Indirect - Real estate N/A					
Indirect - Infrastructure N/A					
Indirect - Hedge funds N/A					

## Indicator Level Scores For Direct - Fixed income - SSA

Section	Sub-section	Topic	Indicator	Your Score
Pre-investment phase	Materiality analysis	AUM coverage of ESG materiality assessment process	FI 1	200/200
Pre-investment phase	Materiality analysis	How ESG is incorporated into materiality assessment process	FI 1.1	200/200
Pre-investment phase	ESG risk management	AUM coverage of ESG incorporation in risk management	FI 2.1	150/150
Pre-investment phase	ESG incorporation in asset valuation	AUM coverage of ESG incorporation in investment research	FI 3.1	82/200
Pre-investment phase	ESG incorporation in portfolio construction	Portion of cases where ESG affected portfolio construction	FI 5.1	200/200
Pre-investment phase	ESG incorporation in assessment of issuers	Incorporation of ESG in credit quality analysis	FI 7	200/200
Pre-investment phase	ESG performance	Incorporation of relative ESG performance in investment analysis	FI 8	150/150
Post-investment phase	ESG risk management	Incorporation of ESG in regular reviews	FI 12	112/150
Post-investment phase	ESG risk management	Identification of ESG incidents	FI 13	200/200
Post-investment phase	Time horizons	Time frame for which ESG risks taken into account	FI 14	150/150
Post-investment phase	Long-term ESG trend analysis	Continuous monitoring of long-term ESG trends	FI 15	150/150
Reporting/Disclosure	ESG screens	Communication of the side-effects of fixed income screening to clients or beneficiaries	FI 21	40/200

## Indicator Level Scores For Direct - Fixed income - Corporate

Section	Sub-section	Topic	Indicator	Your Score
Pre-investment phase	Materiality analysis	AUM coverage of ESG materiality assessment process	FI 1	200/200
Pre-investment phase	Materiality analysis	How ESG is incorporated into materiality assessment process	FI 1.1	200/200
Pre-investment phase	ESG risk management	AUM coverage of ESG incorporation in risk management	FI 2.1	150/150
Pre-investment phase	ESG incorporation in asset valuation	AUM coverage of ESG incorporation in investment research	FI 3.1	82/200
Pre-investment phase	ESG incorporation in portfolio construction	Portion of cases where ESG affected portfolio construction	FI 5.1	200/200
Pre-investment phase	ESG incorporation in assessment of issuers	Incorporation of ESG in credit quality analysis	FI 7	200/200
Pre-investment phase	ESG performance	Incorporation of relative ESG performance in investment analysis	FI 8	150/150
Pre-investment phase	ESG risk management	Corporate bonds: coverage of framework for ESG risks at country and sector level	FI 9.1	150/150
Post-investment phase	ESG risk management	Incorporation of ESG in regular reviews	FI 12	112/150
Post-investment phase	ESG risk management	Identification of ESG incidents	FI 13	200/200
Post-investment phase	Time horizons	Time frame for which ESG risks taken into account	FI 14	150/150
Post-investment phase	Long-term ESG trend analysis	Continuous monitoring of long-term ESG trends	FI 15	150/150
Reporting/Disclosure	ESG screens	Communication of the side-effects of fixed income screening to clients or beneficiaries	FI 21	0/200



## Indicator Level Scores For Direct - Fixed income - Securitised

Section	Sub-section	Topic	Indicator	Your Score
Pre-investment phase	Materiality analysis	AUM coverage of ESG materiality assessment process	FI 1	0/200
Pre-investment phase	Materiality analysis	How ESG is incorporated into materiality assessment process	FI 1.1	0/200
Pre-investment phase	ESG risk management	AUM coverage of ESG incorporation in risk management	FI 2.1	112/150
Pre-investment phase	ESG incorporation in asset valuation	AUM coverage of ESG incorporation in investment research	FI 3.1	57/200
Pre-investment phase	ESG incorporation in portfolio construction	Portion of cases where ESG affected portfolio construction	FI 5.1	150/200
Pre-investment phase	ESG incorporation in assessment of issuers	Incorporation of ESG in credit quality analysis	FI 7	200/200
Pre-investment phase	ESG performance	Incorporation of relative ESG performance in investment analysis	FI 8	150/150
Pre-investment phase	Securitised products	Securitised debt: parties to which ESG analysis is applied	FI 11	128/200
Post-investment phase	ESG risk management	Incorporation of ESG in regular reviews	FI 12	112/150
Post-investment phase	ESG risk management	Identification of ESG incidents	FI 13	200/200
Post-investment phase	Time horizons	Time frame for which ESG risks taken into account	FI 14	150/150
Post-investment phase	Long-term ESG trend analysis	Continuous monitoring of long-term ESG trends	FI 15	150/150
Reporting/Disclosure	ESG screens	Communication of the side-effects of fixed income screening to clients or beneficiaries	FI 21	40/200

## Indicator Level Scores For Direct - Hedge funds - Multi-strategy

Section	Sub-section	Topic	Indicator	Your Score
Policy	Investment guidelines	Hedge fund specific elements of responsible investment policy	HF 1	0/100
Pre-investment phase	Materiality analysis	AUM coverage of ESG materiality assessment process	HF 2	0/200
Pre-investment phase	Materiality analysis	How ESG is incorporated into materiality assessment process	HF 2.1	0/150
Pre-investment phase	Long-term ESG trend analysis	How long-term ESG trends are incorporated into investment analysis	HF 3	0/150
Pre-investment phase	Long-term ESG trend analysis	AUM coverage of long-term ESG trend incorporation	HF 3.1	0/100
Pre-investment phase	ESG incorporation	AUM coverage of ESG incorporation in investment research	HF 4.1	0/150
Pre-investment phase	ESG incorporation in portfolio construction	Portion of cases where ESG affected portfolio construction	HF 6.1	0/150
Pre-investment phase	ESG incorporation in portfolio construction	How emerging and potential ESG risks are assessed	HF 8	0/150
Post-investment phase	ESG risk management	Compliance processes for negative screening	HF 10	0/200
Post-investment phase	ESG risk management	Incorporation of ESG in regular reviews	HF 11	0/150
Post-investment phase	ESG risk management	Identification of ESG incidents	HF 12	0/150
Reporting/Disclosure	Disclosure on ESG products	Information reported to clients or beneficiaries	HF 13	0/150

## Indicator Level Scores For Direct - Infrastructure

Section	Sub-section	Topic	Indicator	Your Score
Policy	Investment guidelines	Infrastructure specific elements of responsible investment policy	INF 1	200/200
Fundraising	Commitments to investors	Formal responsible investment commitments made	INF 2	150/150
Pre-investment phase	Materiality analysis	Level at which materiality is assessed	INF 3	164/200
Pre-investment phase	Materiality analysis	Tools used in materiality analysis	INF 3.1	96/150
Pre-investment phase	Due diligence	Effect of ESG on selection of infrastructure investments	INF 4	175/200
Pre-investment phase	Due diligence	Processes used to conduct ESG due diligence	INF 5	200/200
Selection, appointment and monitoring of third-party operators	Selection process	ESG factors in selection of third party infrastructure operators	INF 6	0/200
Selection, appointment and monitoring of third-party operators	Appointment process	ESG factors in appointment of third party infrastructure operators	INF 7	73/150
Selection, appointment and monitoring of third-party operators	Monitoring process	ESG factors in monitoring of third party infrastructure operators	INF 8	145/200
Post-investment phase	Monitoring	Tracking of core ESG KPIs	INF 9	100/100
Post-investment phase	Monitoring	Reasoning for ESG targets	INF 10	64/200
Post-investment phase	Monitoring	Processes that support investees in meeting ESG targets	INF 11	127/150
Post-investment phase	Monitoring	Management of post-investment ESG risks and opportunities	INF 12	175/200
Post-investment phase	Monitoring	Processes for ensuring asset-level ESG competence	INF 14	162/200
Post-investment phase	Exit	Responsible investment information shared with buyers at exit	INF 15	0/100
Reporting/Disclosure	ESG portfolio information	Methods for reporting core ESG metrics and targets	INF 16	96/150

## Indicator Level Scores For Investment & Stewardship Policy

Section	Sub-section	Topic	Indicator	Your Score
Responsible investment policy & governance	Responsible investment policy	Signatories responsible investment policy	ISP 1	200/200
Responsible investment policy & governance	Responsible investment policy	Signatories with elements of responsible investment policy	ISP 1.1	200/200
Responsible investment policy & governance	Responsible investment policy	Signatories with public responsible policy elements	ISP 2	200/200
Responsible investment policy & governance	Responsible investment policy	Coverage of responsible policy elements	ISP 3	150/200
Responsible investment policy & governance	Responsible investment policy	Contents of exclusion policy	ISP 4	100/100
Responsible investment policy & governance	Responsible investment policy	Coverage of asset specific guidelines on ESG incorporation	ISP 5	81/150
Responsible investment policy & governance	Governance	Roles with formal oversight and accountability for responsible investment	ISP 6	150/150
Responsible investment policy & governance	Governance	Roles with implementation responsibilities for responsible investment	ISP 7	100/100
Responsible investment policy & governance	People and capabilities	Staff objectives for responsible investment practices	ISP 8	150/150
Responsible investment policy & governance	People and capabilities	Bonuses for responsible investment practices	ISP 8.2	100/100
Responsible investment policy & governance	People and capabilities	Frequency at which staff training for responsible investment is reassessed	ISP 9	100/100
Responsible investment policy & governance	Strategic asset allocation	Signatories incorporating ESG factors in strategic asset allocation	ISP 10.1	103/150
Stewardship	Stewardship policy	Coverage of stewardship policy	ISP 11	125/200
Stewardship	Stewardship policy	Elements of stewardship policy	ISP 12	120/150
Stewardship	Stewardship policy implementation	Primary mechanism of stewardship policy	ISP 13	150/150
Stewardship	Stewardship objectives	Primary objective of stewardship policy	ISP 15	33/200
Stewardship	Stewardship prioritisation	Criteria for prioritising engagement targets	ISP 16	67/100
Stewardship	Collaborative stewardship	Positions on collaborative engagement	ISP 18	75/150
Stewardship	Escalation strategies	Escalation strategies not used in stewardship	ISP 20	100/150

## Indicator Level Scores For Investment & Stewardship Policy (continued)

Section	Sub-section	Topic	Indicator	Your Score
Stewardship	Engaging policymakers	Signatories who engage with public policy makers	ISP 23	200/200
Stewardship	Engaging policymakers	Methods used to engage with public policy makers	ISP 23.1	200/200
Stewardship	Engaging policymakers	Signatories with governance processes to ensure alignment of political activity with stance on responsible investment	ISP 23.2	200/200
Stewardship	Engaging policymakers – Policies	Signatories with policies to ensure alignment of political activity with stance on responsible investment	ISP 24	0/200
Stewardship	Engaging policymakers – Policies	Public disclosure of political influence policies	ISP 24.1	0/150
Stewardship	Engaging policymakers – Transparency	Disclosure of political influence activities	ISP 25	200/200
Climate change	Public support	Signatories publicly supporting the Paris Agreement	ISP 26	150/150
Climate change	Public support	Signatories publicly supporting the TCFD	ISP 27	150/150
Climate change	Governance	Board oversight for climate-related risks and opportunities [TCFD Governance A]	ISP 28	200/200
Climate change	Governance	Management responsibility for climate-related risks and opportunities [TCFD Governance B]	ISP 29	200/200
Climate change	Strategy	Time horizon for climate risks and opportunities [TCFD Strategy A]	ISP 30.1	150/200
Climate change	Strategy	Climate risks and opportunities identified beyond investment horizon [TCFD Strategy A]	ISP 31	0/200
Climate change	Strategy: Scenario analysis	Use of climate scenario analysis	ISP 33	200/200
Sustainability outcomes	Set policies on sustainability outcomes	Location of policy on sustainability outcomes	ISP 40	200/200
Sustainability outcomes	Set policies on sustainability outcomes	Frameworks referred to in sustainability outcomes policies and processes	ISP 41	200/200
Sustainability outcomes	Identify sustainability outcomes	Tools and frameworks used to identify and map activities onto sustainability outcomes	ISP 44	200/200
Sustainability outcomes	Identify sustainability outcomes	Levels at which sustainability outcomes are identified and mapped	ISP 44.1	150/150
Sustainability outcomes	Identify sustainability outcomes	Processes for identifying most salient sustainability outcomes	ISP 45	200/200
Transparency & Confidence-Building Measures	Information disclosed – ESG assets	Information shared regarding ESG products	ISP 46	150/150

## Indicator Level Scores For Investment & Stewardship Policy (continued)

Section	Sub-section	Topic	Indicator	Your Score
Transparency & Confidence-Building Measures	Information disclosed – All assets	Information shared	ISP 49	150/150
Transparency & Confidence-Building Measures	Confidence-building measures	Confidence building measures	ISP 52	128/200
Transparency & Confidence-Building Measures	Confidence-building measures	Internal review: coverage	ISP 58	100/100

## Indicator Level Scores For Direct - Listed equity - Passive - incorporation

Section	Sub-section	Topic	Indicator	Your Score
Pre-investment phase	Materiality analysis	AUM coverage of ESG materiality assessment process	LE 1	150/150
Pre-investment phase	Materiality analysis	How ESG is incorporated into materiality assessment process	LE 1.1	120/200
Pre-investment phase	Long-term ESG trend analysis	Continuous monitoring of long-term ESG trends	LE 2	150/150
Pre-investment phase	ESG incorporation	Coverage of valuation and financial modelling incorporating ESG risks	LE 3.1	0/150
Pre-investment phase	Assessing ESG performance	AUM coverage of information used in incorporating ESG in financial modelling	LE 4.1	0/150
Pre-investment phase	ESG incorporation in portfolio construction	Portion of cases where ESG affected portfolio construction	LE 6.1	98/150
Post-investment phase	ESG risk management	Incorporation of ESG in regular reviews	LE 9	112/150
Post-investment phase	ESG risk management	Identification of ESG incidents	LE 10	100/100
Post-investment phase	Passive equity	Percentage of passive listed equity holdings that use an ESG benchmark or index	LE 12	0/150
Reporting/Disclosure	Sharing ESG information with stakeholders	ESG information included in client reporting	LE 14	150/200

## Indicator Level Scores For Direct - Listed equity - Passive - voting

Section	Sub-section	Topic	Indicator	Your Score
Stewardship	Voting policy	Voting policies	LE 15	200/200
Stewardship	Voting policy	Coverage of voting policy	LE 15.1	200/200
Stewardship	Voting policy	Guidance on specific ESG issues in voting policy	LE 16	150/150
Stewardship	Alignment & effectiveness	Consistency between voting policy and advice from external voting advisors	LE 17	75/100
Stewardship	Security lending policy	Securities lending	LE 18	0/200
Stewardship	Security lending policy	Voting and securities lending	LE 18.1	0/150
Stewardship	Security lending policy	Exclusions in securities lending	LE 18.2	0/100
Stewardship	Shareholder resolutions	Stance on shareholder resolutions	LE 19	112/150
Stewardship	Pre-declaration of votes	Pre-declaration of votes	LE 20	0/150
Stewardship	Voting disclosure post AGM/EGM	Disclosure of voting activities	LE 21	200/200
Stewardship	Voting disclosure post AGM/EGM	Time between vote and disclosure of voting activities	LE 21.1	150/150
Stewardship	Voting disclosure post AGM/EGM	Coverage of communication of the rationale for voting abstain/against management recommendations	LE 22.1	0/150
Stewardship	Voting disclosure post AGM/EGM	Coverage of communication of the rationale for voting abstain/against PRI signatory resolutions	LE 23.1	0/100



## Indicator Level Scores For Direct - Listed equity - Active quantitative - incorporation

Section	Sub-section	Topic	Indicator	Your Score
Pre-investment phase	Materiality analysis	AUM coverage of ESG materiality assessment process	LE 1	150/150
Pre-investment phase	Materiality analysis	How ESG is incorporated into materiality assessment process	LE 1.1	160/200
Pre-investment phase	Long-term ESG trend analysis	Continuous monitoring of long-term ESG trends	LE 2	150/150
Pre-investment phase	ESG incorporation	Coverage of valuation and financial modelling incorporating ESG risks	LE 3.1	61/150
Pre-investment phase	Assessing ESG performance	AUM coverage of information used in incorporating ESG in financial modelling	LE 4.1	112/150
Pre-investment phase	ESG incorporation in portfolio construction	Portion of cases where ESG affected portfolio construction	LE 6.1	86/150
Pre-investment phase	ESG risk management	Compliance processes for negative screening	LE 8	128/200
Post-investment phase	ESG risk management	Incorporation of ESG in regular reviews	LE 9	112/150
Post-investment phase	ESG risk management	Identification of ESG incidents	LE 10	100/100
Reporting/Disclosure	Sharing ESG information with stakeholders	Communication of the side-effects of listed equity screening to clients or beneficiaries	LE 13	100/100
Reporting/Disclosure	Sharing ESG information with stakeholders	ESG information included in client reporting	LE 14	150/200

## Indicator Level Scores For Direct - Listed equity - Active quantitative - voting

Section	Sub-section	Topic	Indicator	Your Score
Stewardship	Voting policy	Voting policies	LE 15	200/200
Stewardship	Voting policy	Coverage of voting policy	LE 15.1	200/200
Stewardship	Voting policy	Guidance on specific ESG issues in voting policy	LE 16	150/150
Stewardship	Alignment & effectiveness	Consistency between voting policy and advice from external voting advisors	LE 17	75/100
Stewardship	Security lending policy	Securities lending	LE 18	0/200
Stewardship	Security lending policy	Voting and securities lending	LE 18.1	0/150
Stewardship	Security lending policy	Exclusions in securities lending	LE 18.2	0/100
Stewardship	Shareholder resolutions	Stance on shareholder resolutions	LE 19	112/150
Stewardship	Pre-declaration of votes	Pre-declaration of votes	LE 20	0/150
Stewardship	Voting disclosure post AGM/EGM	Disclosure of voting activities	LE 21	200/200
Stewardship	Voting disclosure post AGM/EGM	Time between vote and disclosure of voting activities	LE 21.1	150/150
Stewardship	Voting disclosure post AGM/EGM	Coverage of communication of the rationale for voting abstain/against management recommendations	LE 22.1	0/150
Stewardship	Voting disclosure post AGM/EGM	Coverage of communication of the rationale for voting abstain/against PRI signatory resolutions	LE 23.1	0/100

## Indicator Level Scores For Indirect - Private equity

Section	Sub-section	Topic	Indicator	Your Score
Investment consultants	Investment consultant selection	Criteria for selecting investment consultants	SAM 1	0/150
Selection	Responsible investment policy	Compliance with responsible investment policy - coverage	SAM 2.1	0/150
Selection	Research and screening	Manager selection criteria: conduct and capabilities	SAM 3	0/150
Selection	Investment practices	Manager selection criteria: investment practices	SAM 4	0/200
Selection	Stewardship	Manager selection criteria: stewardship policy	SAM 6	0/200
Selection	Stewardship	Manager selection criteria: stewardship practices	SAM 7	0/200
Selection	Documentation and track record	Review of information in manager selection	SAM 11	0/200
Appointment	Pooled funds	Manager appointment for pooled funds	SAM 12	0/200
Appointment	Segregated mandates	Contractual requirements in manager appointment for segregated funds	SAM 13	0/200
Monitoring	Investment practices	Manager monitoring: investment practices	SAM 14	0/150
Monitoring	Stewardship	Manager monitoring: stewardship	SAM 17	0/150
Monitoring	Review	Manager monitoring: reporting	SAM 20	0/100
Monitoring	Engagement and escalation	Manager monitoring: formal grievance processes	SAM 22	0/150

## Indicator Level Scores For Direct - Real estate

Section	Sub-section	Topic	Indicator	Your Score
Policy	Investment guidelines	Real estate specific elements of responsible investment policy	RE 1	200/200
Fundraising	Commitments to investors	Formal responsible investment commitments made	RE 2	96/150
Pre-investment phase	Materiality analysis	Level at which materiality is assessed	RE 3	200/200
Pre-investment phase	Materiality analysis	Tools used in materiality analysis	RE 3.1	150/150
Pre-investment phase	Due diligence	Effect of ESG on selection of real estate investments	RE 4	156/200
Pre-investment phase	Due diligence	Processes used to conduct ESG due diligence	RE 5	200/200
Selection, appointment and monitoring of third-party property managers	Selection process	ESG factors in selection of third party property managers	RE 6	200/200
Selection, appointment and monitoring of third-party property managers	Appointment process	ESG factors in appointment of third party property managers	RE 7	112/150
Selection, appointment and monitoring of third-party property managers	Monitoring process	ESG factors in monitoring of third party property managers	RE 8	150/200
Construction and development	Construction requirements	Sustainability requirements in developments and major renovations	RE 9	200/200
Construction and development	Minimum building requirements	Minimum building requirements for developments and major recommendations	RE 10	150/200
Post-investment phase	Monitoring	Operational ESG data collected	RE 11	142/200
Post-investment phase	Monitoring	Target setting for core ESG KPIs	RE 12	64/200
Post-investment phase	Monitoring	Processes that support investees in meeting ESG targets	RE 13	122/150
Post-investment phase	Monitoring	Management of post-investment ESG risks and opportunities	RE 14	133/200
Post-investment phase	Monitoring	Percentage of real estate assets with external certification	RE 16	32/100
Post-investment phase	Stewardship	Engagement with tenants	RE 17	100/150
Post-investment phase	Exit	Responsible investment information shared with buyers at exit	RE 18	100/100
Reporting/Disclosure	ESG portfolio information	Methods for reporting core ESG metrics and targets	RE 19	48/150