

Swiss Life Asset Managers launches Equity Impact Funds focusing on climate change, biodiversity and urbanisation

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With its three dedicated equity impact-aligned funds, Swiss Life Asset Managers strives to build the next generation of purpose-driven impact investments with an attractive risk-return profile. The palette of investment solutions provides clients with a unique and diversified access to specialised companies and supports the achievement of the United Nations' Sustainable Development Goals.

Swiss Life Asset Managers' impact investments intend to generate positive and measurable environmental impact alongside a financial return. All dedicated funds under the umbrella are SFDR Art.9 compliant, as well as impact aligned, which means they invest in companies whose products contribute to the achievement of specific UN Sustainable Development Goals (SDGs).

The **Swiss Life Funds (LUX) Equity Climate Impact Fund** invests in companies whose products and services contribute to mitigate climate change. Such companies typically operate in business areas like alternative energy generation, electric vehicles, or energy efficiency solutions.

The **Swiss Life Funds (LUX) Equity Environment & Biodiversity Impact Fund** selects companies whose products and services contribute to preserve terrestrial and marine ecosystems and biodiversity. For example, in the areas of pollution prevention and control, water treatment or sustainable agriculture.

Swiss Life Funds (LUX) Equity Green Buildings & Infrastructure Impact invests in companies whose products and services help develop energy-efficient buildings and green infrastructure to reduce the environmental impact of urban communities. For example, products and solutions in the field of clean transport infrastructure, energy efficient lighting and insulation solutions.

“We are convinced that investors have an essential role to play in accelerating the development of business models with positive environmental impact, by

directing their investments towards innovative companies offering solutions to environmental challenges.”
 Comments José Antonio Blanco, Head Investment Management at Swiss Life Asset Managers.

Clear and Measurable

A hallmark of impact investing is the commitment of the investor to measure and report the social and environmental performance and progress of underlying investments, ensuring transparency and accountability while informing the stakeholders of impact investing and developing the field. Our impact measurement of companies' contribution aligns with the framework of The United Nation Sustainable Development Goals (SDGs).

This means selection of the relevant and investable SDGs for each environmental challenges targeted by the funds. Swiss Life Asset Managers uses clearly defined and easy to understand impact and ESG metrics to build the investment approach. Revenue share from impact products and services is the key metric for the funds. The objective is to maximise the impact revenue share while retaining a well-diversified portfolio with attractive return potential.

For each fund, there is a set of minimum impact revenue share conditions to respect based on the maturity of each market. All funds have to exclude companies with a cumulative negative contribution to any SDG above 5% of revenue, as well as companies with a low ESG-rating or severe controversy. By contributing to the achievement of the selected SDGs, the funds invest in companies that generate a measurable positive impact

along adequate financial returns.

Advantages of investing in impact funds

The impact investing market offers diverse and viable opportunities for investors to advance social and environmental solutions through investments that also produce attractive financial returns. Swiss Life Asset Managers' equity impact funds are a focused and dedicated set of funds which allow investors contribute to specific environmental goals with a risk optimised and geographically diversified investment strategy. Impact investing is seen as a useful complement to other investments in a portfolio.

“Our futures are interdependent. As investors we have the opportunity to take on the challenges facing our

environment. Through impact investing, we can support environmental and social change and at the same time achieve our goals as investors.” adds Marco Della Seta, Head Portfolio Management Equity at Swiss Life Asset Managers.

Responsible investing at Swiss Life Asset Managers

Sustainable investments are deeply embedded in the corporate DNA of Swiss Life Asset Managers. In the last few years, Swiss Life Asset Managers has developed a comprehensive ESG concept and approach to responsible investing. For detailed information can be found in the [Responsible Investment Report](#).

Information

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Swiss Life Asset Managers

Swiss Life Asset Managers has more than 160 years of experience in managing the assets of the Swiss Life Group. This insurance background has exerted a key influence on the investment philosophy of Swiss Life Asset Managers, which is governed by such principles as value preservation, the generation of consistent and sustainable performance and a responsible approach to risks. That's how we lay the groundwork for our clients to make solid, long-term plans – in self-determination and with financial confidence. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg and the UK.

As at 30 June 2021 assets under management for third-party clients amount to CHF 98.9 billion. Together with insurance mandates for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at CHF 274.4 billion. Swiss Life Asset Managers is a leading real estate manager in Europe¹. Of the assets totaling CHF 274.4 billion, CHF 81.8 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling CHF 28.8 billion in value. Total real estate under management and administration at the end of June 2021 thus came to CHF 110.6 billion.

Swiss Life Asset Managers employs more than 2400 people in Europe.

Self-determined Life

Swiss Life enables people to lead a self-determined life and look to the future with confidence. Swiss Life Asset Managers pursues the same goal: We think long-term and act responsibly. We use our knowledge and experience to develop future-oriented investment solutions. This is how we support our customers in achieving their long-term investment objectives, which in turn also take account of their client's needs so they can plan their financial future in a self-determined manner.

¹ INREV Fund Manager Survey 2021 (AuM as of 31.12.2020)

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