

Swiss Life Asset Managers strengthens its SRI offering

29 June 2022

True to its commitment and values in the field of socially responsible investment (SRI), Swiss Life Asset Managers is developing its SRI offering and announces the SRI labelling of eight new funds.

On 22 June 2022, EY France awarded the SRI label to eight funds (equity, bond, investment grade and high yield) managed by Swiss Life Asset Managers:

- Swiss Life Funds (LUX) Bond ESG Global Corporates;
- Swiss Life Funds (LUX) Bond Euro High Yield;
- Swiss Life Funds (LUX) Equity USA;
- Swiss Life Funds (LUX) Equity ESG Global;
- Swiss Life Funds (LUX) Equity Global Protect;
- Swiss Life Funds (LUX) Equity Global Minimum Volatility;
- Swiss Life Funds (LUX) Income Equity Euro Zone ;
- Swiss Life Funds (F) Bond 6M.

By obtaining eight new SRI labels, Swiss Life Asset Managers is confirming its SRI ambition with a total of 23 SRI-labelled funds with EUR 16.4 billion in assets under management as at 30 April 2022*.

Responsible investment at Swiss Life Asset Managers

Responsible investments are part of the DNA of Swiss Life Asset Managers who developed a global ESG approach to responsible investment.

Swiss Life Asset Managers has a wide SRI-labelled offering and also announced the launch last February of three environmental impact equity funds dedicated to climate change, biodiversity and urbanization.

Detailed information can be found in the Responsible Investment Report.



Learn more about the SRI Label

The SRI Label is a public label created under the aegis of the French Ministry of Finance. It is facilitated jointly by the AFG (French Asset Management Association), le FIR (French Sustainable Investment Forum) and the Directorate General of the Treasury. Awarded for a period of three years, it includes follow-up audits once a year.

The SRI Label was awarded after an audit covering six pillars:

- the general objectives of the funds;
- the methodology for analysing and rating ESG criteria (environmental, social, governance);
- their integration in the investment strategy of the funds;
- the ESG engagement and voting policy at General Assembly;
- transparent management;
- and the measurement of the ESG performance of the funds.

*As at 31 December 2021, Swiss Life Asset Managers France had assets under management of EUR 62.1 billion all expertises taken together.

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About Swiss Life Asset Managers

Swiss Life Asset Managers has more than 165 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. Swiss Life Asset Managers offers this proven approach to third-party clients in Switzerland, France, Germany, Luxembourg, the UK and the Nordic countries.

As at 31 December 2021 assets under management for third-party clients amount to EUR 99.1 billion. Together with insurance assets for the Swiss Life Group, total assets under management at Swiss Life Asset Managers stood at EUR 266.3 billion. Swiss Life Asset Managers is a leading real estate manager in Europe¹. Of the assets totalling EUR 266.3 billion, EUR 84 billion is invested in real estate. In addition, Swiss Life Asset Managers, in cooperation with Livit, manages real estate totalling EUR 27.8 billion in value. Total real estate under management and administration at the end of December 2021 thus came to EUR 111.8 billion.

Swiss Life Asset Managers' clients benefit from the commitment and expertise of more than 2,500 employees in Europe.

¹ INREV Fund Manager Survey 2021 (AuM as of 31.12.2020)
Swiss Life Asset Managers data as of 31/12/2021

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.