ESG SCREEN
An unique and accurate methodology for investment monitoring

ENVIRONMENT
SOCIAL
GOVERNANCE

www.conser.ch
ESG screen — Our Methodology
An unbiased approach to evaluate & compare classical as well as sustainable funds

| Neutrality                  | • aggregation of multiple ESG sources  |
|                            | • avoidance of methodological bias & guaranty of consistency |
|                            | • creation of a market ESG consensus |

| Reliability                | • automated process  |
|                            | • systematic and non-biased approach |
|                            | • results easy to read and to understand |

| Comparability              | • easy comparison of each fund with benchmarks and other funds  |
|                            | • availability of a unique dashboard to visualize the results |
ESG screen - Neutrality

Our ESG consensus approach

Multiple sources

- Public data

Consensus building

- Extracted data

- ESG ratings

Portfolio analysis

<table>
<thead>
<tr>
<th>Company</th>
<th>Normalized ratings</th>
<th>ESG consensus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilever</td>
<td>ABBBBBBBBBBB</td>
<td>B</td>
</tr>
<tr>
<td>Nestlé</td>
<td>BBBBBSBCCCC</td>
<td>B</td>
</tr>
<tr>
<td>ABB</td>
<td>AAAAAAABB</td>
<td>A</td>
</tr>
<tr>
<td>Transocean</td>
<td>CCCCCDDD</td>
<td>C</td>
</tr>
<tr>
<td>SWISSRE</td>
<td>AAAAAABBB</td>
<td>A</td>
</tr>
<tr>
<td>UBS</td>
<td>BBBBBSBBBBBBB</td>
<td>C</td>
</tr>
</tbody>
</table>

Coverage:

- 5'000 companies
- 180 countries
- Bonds & equities
ESG screen - Reliability
Sustainability check and impact measurement

portfolio’s overall ESG quality

holdings’ coverage

exposure to major ESG* controversies

impact measurement

* ESG: environmental, social et governance

ESG CONSENSUS™
Sustainable positioning compared to major benchmarks based on average and strength of the ESG Consensus™

FINAL SUSTAINABILITY GRADE
Holdings sustainability quality based on the ESG Consensus™ and including major controversies and impacts

comparative positioning

* The ESG Consensus is a proprietary methodology of Conser using a multi-attribute approach of several independent and recognised ESG sources (Environmental, Social and Governance criteria)
ESG screen - Comparability

Comparative positioning of each fund respective to their benchmark
Who is Conser

Our clients

- Banks
- Pension funds
- Foundations

Our involvements

- sustainable finance geneva
- Sustainable Finance
- Geneva forum for sustainable investment 2015

Our memberships

- PRI Principles for Responsible Investment
- CDP Driving Sustainable Economies
- VSV ASG
Your advisor in sustainable finance

• Company founded in 2007, entirely **focused on sustainable finance & responsible investment**

• Each partner benefits from over **15 years experience** in sustainable finance

• **Supervised** by the Swiss Association of Asset Managers (SAAM)

• **Proprietary tools** enable a progressive and personalized approach:
  
  – Portfolio Check  
  `ESG* quality and impact measurement`

  – Values Profile  
  `client sensitivity and investment principles`

  – Open Architecture  
  `database of over 1300 sustainable funds`

*ESG: environmental, social et de governance*
Our experts

Management Team

Angela de Wolff, Business development & advisory
Active in the financial sector for 22 years, 15 years in RI.
Former Head of SRI at Lombard Odier & current Board Member of Banque Cantonale Geneve and Swiss Sustainable Finance.
Founding Partner Conser.

Natacha Guerdat, Asset management & fund selection
15 years dedicated to sustainable finance.
Former sustainability portfolio manager at Lombard Odier.
Founding Partner Conser.

Jean Laville, ESG & risk management
25 years experience in asset management, 15 years in RI.
Former Deputy Director at the Ethos Foundation and Pictet & Cie. Current Deputy CEO of Swiss Sustainable Finance.
Partner Conser.

Anthony Chatelanat, Project management
15 years in the financial sector, Financial analyst, Entrepreneur.
Founder of Finetika.

Board

Olivier Collombin
Former Capital Partner LODH
Founder E-Merging
Board member Conser

Bernard Vischer
Senior Partner at law firm Schellenberg Wittmer
Board member Conser
Our expertise at your disposal

✓ Swiss firm with a long track-record in sustainable finance
✓ Proprietary methodology and tools
✓ Independent profile & proven expertise
✓ Large local and international network

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