

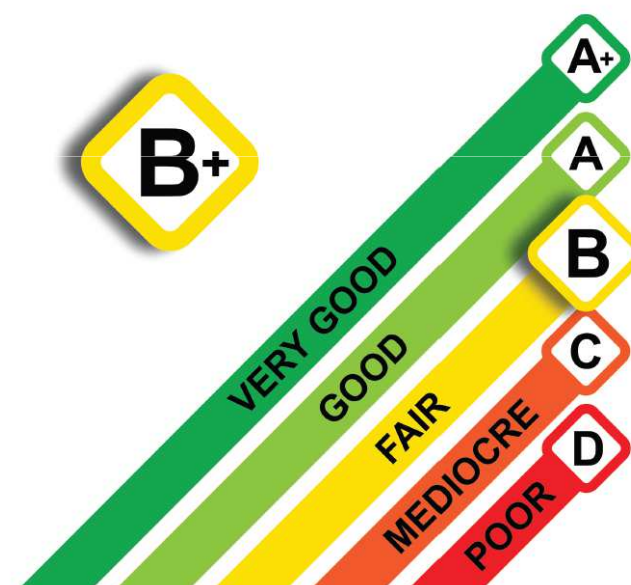
ESG SCREEN

An unique and accurate methodology for
investment monitoring

ENVIRONMENT

SOCIAL

GOVERNANCE



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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

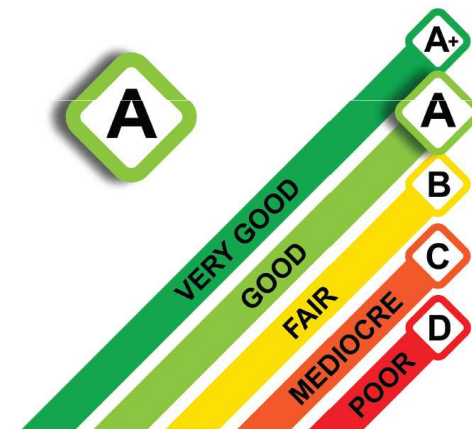


Consensus building

Company	Normalized ratings	ESG consensus
Unilever	AABBBBBBBBBB	B
Nestlé	BBBBBBBCCC	B
ABB	AAAAAAABB	A
Transocean	CCCCDDD	C
SWISSRE	AAAAAABB	A
UBS	BBBBBCCCCC	C

Coverage:
 5'000 companies
 180 countries
 bonds & equities

Portfolio analysis



ESG screen - Reliability

Sustainability check and impact measurement

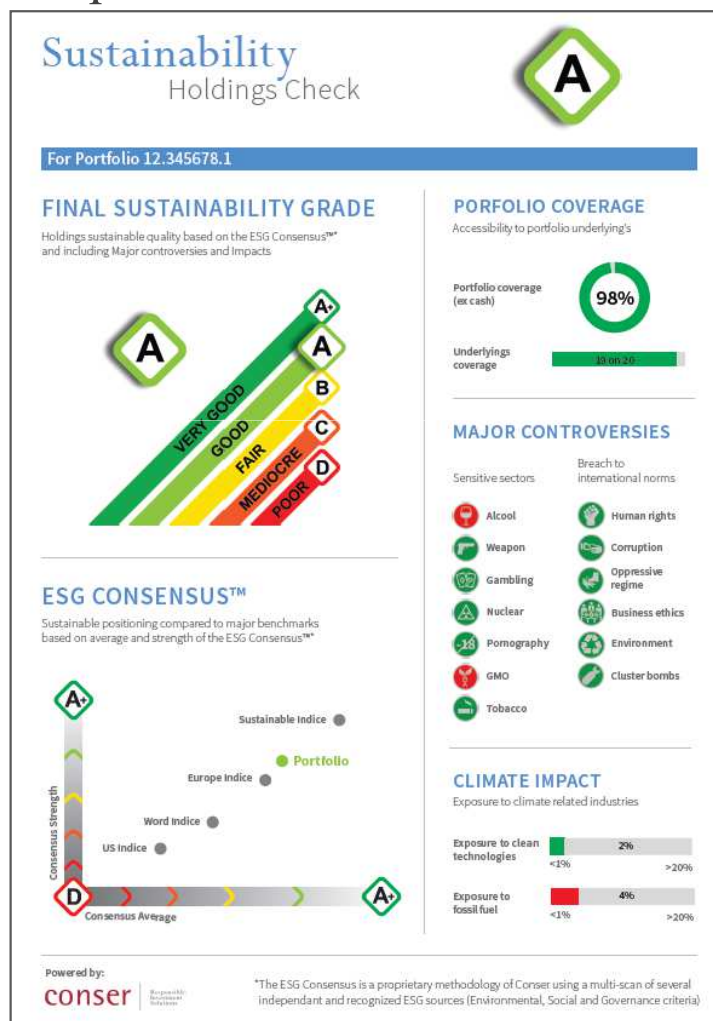
portfolio's overall ESG quality

comparative positioning

holdings' coverage

exposure to major ESG* controversies

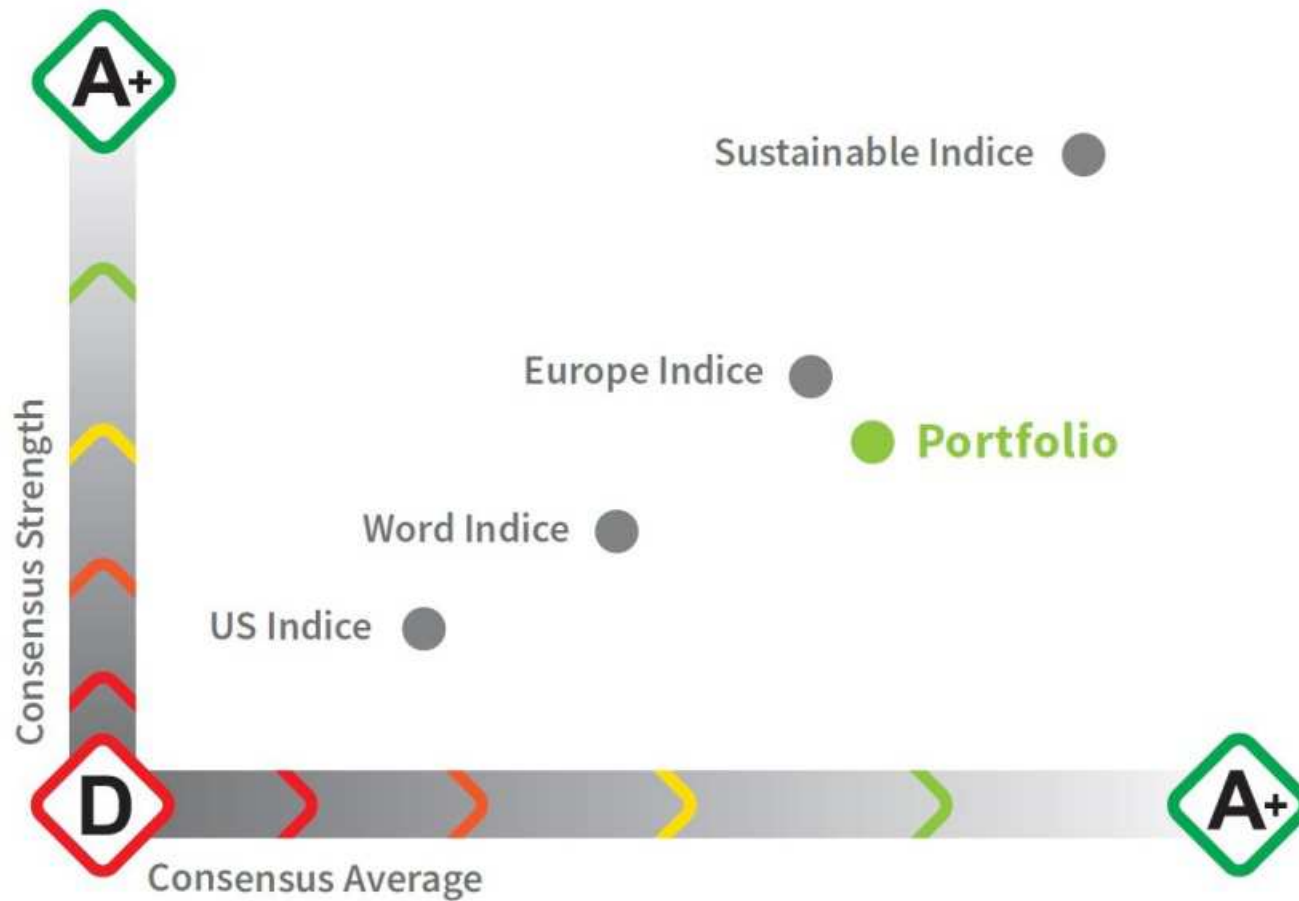
impact measurement



* ESG: environmental, social et governance

ESG screen - Comparability

Comparative positioning of each fund respective to their benchmark



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Who is Conser

Our clients



Banks



Pension funds



Foundations

Our involvements



Our memberships



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

info@conser.ch

+41 (0)22 907 71 00

11, bd James Fazy -1201 Genève

www.conser.ch

