

SDG-aligned Investing

One of our sustainability approaches in the ZKB Discretionary Mandate and ZKB Portfolio Consulting (Classic, Premium, Expert, International)



The Sustainable Development Goals (SDGs) refer to the UN's 17 goals for sustainable development on an economic, social and ecological level. The consideration of SDGs in the investment context means that investments are made in companies whose products and/or services contribute to one or more of the goals.

What does SDG stand for?

The Sustainable Development Goals (SDGs) are the 17 goals for sustainable development set by the United Nations in 2015. They are intended to act as a catalyst for sustainable global development on an economic, social and ecological level. The SDGs form the centrepiece of the United Nations 2030 Agenda for Sustainable Development, which has been signed by all UN member states. The SDGs formulate objectives to be achieved by 2030 on topics such as health and well-being, gender equality, affordable and clean energy as well as sustainable consumption and production.



What is meant by SDG-aligned investing?

Companies can, in addition to financial returns, aim to achieve positive social and environmental impacts, for example by focussing on overcoming specific challenges as described in the SDGs. SDG-aligned investments are investments in companies whose products and/or services are designed to contribute to achieving one or more SDGs. SDG-aligned investing are theme-based additions to our reference portfolios.

Which characteristics of the ZKB Discretionary Mandate and ZKB Portfolio Consulting is SDG-aligned investing used in?

Thematic investments (SDG-aligned investing) are only included in reference portfolios with the characteristic Responsible (ESG) and usually make up less than 10% of the total portfolio. SDG-aligned investing is not systematically used in reference portfolios with the characteristics Basic, Individual Securities and Index.

Since the client makes the investment decisions with the ZKB Portfolio Consulting and thus determines the composition of the advisory portfolio, the proportion of SDG-aligned investing in the client portfolio may differ from that of the corresponding reference portfolio.

01  No poverty	02  Zero hunger	03  Good health and well-being
04  Quality education	05  Gender equality	06  Clean water and sanitation
07  Affordable and clean energy	08  Decent work and economic growth	09  Industry, innovation and infrastructure
10  Reduced inequalities	11  Sustainable cities and communities	12  Responsible consumption and production
13  Climate action	14  Life below water	15  Life on land
16  Peace, justice and strong institutions	17  Partnerships for the goals	The global goals for sustainable development Source: sdgs.un.org/goals

What criteria does an investment instrument need to meet in order to be considered SDG-aligned?

SDG-aligned investing is implemented via investment funds. In order to be considered SDG-aligned according to our sustainability approach, the fund manager must explicitly commit to the SDG being pursued or a topic that can be allocated to the SDGs. In addition to this, at least 2/3 of the investments contained in the investment fund must be aligned with the fund's SDG investment theme.

We obtain this data from the external data provider MSCI ESG Research LLC. The calculation shown relates exclusively to the portion of the portfolio for which corresponding data is available.

For more information on our sustainability approaches, please contact your client advisor.

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