



SPAFID CONNECT

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Informazione
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Diffusione presunta

Oggetto : PR: Banca Generali presents the new ESG strategy

Testo del comunicato

Vedi allegato.

**PRESS
RELEASE**

Banca Generali leads clients in discovery of sustainable development goals

- New platform for the selection of ESG products
- New portal for constructing portfolios based on sustainable investment objectives (according to the UN's 17 Sustainable Development Goals)
- Exclusive partnership with MainStreet to map ESG investments

ESG target for 2021: over 10% of managed assets

Milan, 25 February 2019 – Banca Generali, at the forefront of sustainable investing, is launching a series of new instruments aimed at familiarising households and financial advisors with the construction of portfolios that take account of the range of sensibilities relating to ESG issues.

With the contribution of MainStreet Partners, a London-based firm specialised in sustainable investment advisory, Banca Generali has expanded its proprietary portfolio construction platform — BG Personal Portfolio — to include a quantitative method for precisely measuring the positive impacts on the environment, social support and sound, efficient corporate governance.

The introduction of the new technology — designed on an ad hoc basis by MainStreet Partners — adds new dimensions of value to investment, while continuing to ensure the advisory team's professionalism.

The new IT platform permits:

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SUSTAINABLE INVESTMENT RESEARCH: selection by ESG thematic area, rating and UN SDGs (Sustainable Development Goals). Advanced fund analysis and research based on the social, environmental and governance behaviour and alignment with SDGs of the companies in portfolio.

PRODUCT SUSTAINABILITY SHEET: complete screening of the sustainability level of each fund and the related management team. The innovative element relates to the measurement of the concrete results in terms of the positive social, environmental and governance impacts.

BESPOKE PORTFOLIOS: Banca Generali's financial advisory team creates sustainable portfolios suited to each investor's risk profile, personal needs and sensibilities relating to his or her favourite SDGs.

OPTIMISATION ENGINES: the platform's technology allows portfolio sustainability to be maximised in keeping with the investor's requests, factoring in the weighting and orientation to be pursued.

Chief Executive Officer Gian Maria Mossa stated: *"I am very proud of this initiative, which allows our clients and bankers to incorporate the assessment and impact of ESG factors into their investment decisions. The financial instrument analysis engine integrated into our digital platform ensures full customisation of decisions in keeping with investors' sensibilities regarding the United Nations' 17 Sustainable Development Goals. We believe strongly in the importance of sustainable growth capable of creating value for all stakeholders, and the innovative nature of this instrument represents a considerable step forwards for advisory. Awareness of social, environmental and governance responsibility is increasing amongst households, and we are convinced that in the next three years these solutions will extend to over 10% of managed assets."*

To offer ESG products, Banca Generali is partnering with 26 investment houses to which it acts as distributor of their main funds and to which the management company has granted a management mandate for specific sub-funds of the SICAV Lux IM, presented in spring 2018.

In keeping with the Generali Group's values, at its last General Shareholders' Meeting the company formed a specific Board committee — the Nomination, Governance and Sustainability Committee — assigned specific tasks and objectives relating to sustainability.

Fine Comunicato n.0856-6

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