



IST IMMO OPTIMA SWITZERLAND

IST Portfolio

Portfolio Manager	Swiss Finance & Property
GRESB Score ¹	78/100
SFDR Category ²	not applicable
Investment strategy	Active

¹ <https://www.gresb.com/nl-en/>

² SFDR: The Sustainable Finance Disclosure Regulation is a European regulation introduced to improve transparency in the market for sustainable investment products. <https://www.eurosif.org/policies/sfdr/>

Applied ESG Approaches

Exclusion

Not applicable

Proxy Voting

Not applicable, as only investments into real estate funds.

Engagement



Yes. Initial focus of dialogue was on publication of ESG reports by invested real estate funds. Engagement is performed by portfolio manager directly.

ESG Integration

Not applicable

Best-in-Class

Not applicable

Thematic/ Impact Investing

Not applicable

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Facts & figures

Assets under management	USD 9 bn
Whereof in sustainable investment strategies	USD 2.4 bn
Number of inv. profess.	50
Whereof dedicated to ESG	3
Signatory to UNPRI	Yes
UNPRI rating	First rating pending
Memberships (selection only):	
<ul style="list-style-type: none"> GRESB Investor Member Swiss Sustainable Finance (SSF) 	<ul style="list-style-type: none"> GRI-Standards (for reporting)

Consultant/ Partnerships

- Pom+
- Sustainserv

Carbon Strategy

CO₂ footprint measured for direct real estate investment

Voting Activity

Yes, as required in internal policy

Engagement

Yes

Sustainable Investing (ESG Integration)

As a leading independent real estate asset manager, the consideration of ESG aspects in investment decisions and portfolio management is of particular importance to SFP Group.



Our ambition

Products	Clients	Environment	Employees
Certified sustainability integrated into the entire range of products.	Transparent and reliable ESG reporting for clients and other stakeholders in our own investment vehicles.	Active reduction of the negative environmental impacts of our investment products and directly held properties.	Creation and promotion of a secure, innovative, inclusive and inspiring work environment.

Our commitment

Our investment products are rated with regard to their social and environmental sustainability. Directly held properties report their CO ₂ emissions and endeavour to continuously reduce them.	Supporting stakeholders and offering training on ESG criteria to employees who deal with clients, and practising active ownership as an investor.	We are halving our CO ₂ emissions and reducing our energy consumption in comparison to 2019, investing in renewable energy sources and procure at least 50% of our electricity from renewable sources.	We empower our employees to do their best, aim to keep our employee turnover rate below 10% and do not tolerate any discrimination.
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Our core values

Applying ethically correct and exemplary corporate governance, we comply with all legal, environmental and social requirements applicable to us. Thanks to our broad-based precautionary measures, our risk management is sound, solid and includes climate risks. We do not tolerate corruption, regularly train our employees on anti-corruption policies and procedures, and expect the same from our business partners.

<https://www.sfp.ch/sfp-gruppe/nachhaltigkeit/esg-bericht-1>

Next steps and further developments

The SFP Group is committed to achieving the 2030 and 2050 climate targets set by the Swiss Federal Council's 2030 and 2050 climate targets, which aim to achieve a long-term reduction of greenhouse gases in accordance with the Paris Climate Agreement, are to be met. We also have the ambition that the targets for direct and indirect real estate investments are in line with the overall strategy of the SFP Group.