

SOCIETE GENERALE PRIVATE BANKING STRENGTHENS ITS SUSTAINABLE COMMITMENT BY INTRODUCING A NEW POSITIVE IMPACT INVESTMENT FUND ADDRESSING CLIMATE CHANGE

Press release

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As environmental and societal challenges grow, our clients are looking for purpose with more meaningful investments. To meet their need, in line with the Group's commitments, Societe Generale Private Banking is launching a new fund dedicated to climate change: "Moorea Fund - Sustainable Climate Action".

Resulting from the synergy between the Private Bank's two asset management companies - Société Générale Private Wealth Management and SG 29 Haussmann - **this fund is aligned with the United Nations' Sustainable Development Goals (SDGs)**. Climate change being a major challenge for our society, it is at the heart of all concerns; throughout the world, companies, governments, and citizens are mobilizing to address it.

Owing to this growing awareness, the levers for a climate change have been clearly identified: new legislations, changes in the demand and the economies. Companies at the heart of this change are gradually committing themselves and creating new investment opportunities. In this new context, which is increasingly favorable to eco-sectors and facilitates environmental initiatives, we believe it is essential to **guide clients towards positive impact investments**.

In the long term, we believe that companies that take into account environmental and social concerns and that maintain a high level of corporate governance will be key investments. This sustainable approach allows us to capture the dynamics of the equity markets and to link them to the development of eco-sectors.

Our focus is to offer a fund that seeks long-term capital appreciation and to generate a positive environmental impact through **investments in equities issued by companies operating in sustainable eco-sectors and developing solutions** that actively contribute to the environmental transition. Sustainable eco-activities include - but are not limited to - renewable energy, energy efficiency, green mobility, green buildings, sustainable water and agriculture, and the circular economy.

Building on an investment philosophy initiated several years ago, this fund specifically aims to:

- Invest in international companies with a high environmental impact,
- Deliver a carbon intensity significantly lower than 20% compared to the MSCI World All Country Index (MSCI ACWI Index),
- Deliver a portfolio aligned with the Paris scenario - maximum warming of the earth's temperature of 1.5 to 2°C above pre-industrial levels.

"This fund is the culmination of significant fundamental and quantitative research. It provides our clients with a high-performance solution that reconciles the protection of their savings with the pursuit of sustainable development objectives," comments Guillaume de Martel, Executive Chairman of SG 29 Haussmann.

"We want to offer a complete range of solutions and strategies dedicated to sustainable and responsible investments and developed for private investors. We are indeed convinced that a strong corporate social responsibility policy is synonymous with sustainable financial performance" explains Alexandre Cegarra, CEO of SGPWM.

To ensure the consistency of the proposed initiatives, the companies selected for the "Moorea Fund: Sustainable Climate Action" meet both ESG (environmental, social and governance) criteria and rigorous financial criteria. In addition to a solid and established business model, companies must have sustainable growth prospects, a strong balance sheet and a proven ability to earn an appropriate return on equity.

Finally, this **UCITS fund has a European passport meeting the highest level of European regulation on sustainable finance** (SFDR* art.9) and has a UCITS 6 risk/return profile.

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*SFDR: SGPWM (as a financial manager by delegation of mandates) is subject to the new European regulation "SFDR" (Sustainable Finance Disclosure Regulation) adopted on 27 November 2019 by the European Parliament and the Council of the European Union and implemented since March 2021. The aim of this regulation is to harmonize, at the European level, the inclusion and communication of non-financial criteria by portfolio managers to increase transparency for their clients. The extra-financial criteria allow to assess the action of economic agents on sustainable development issues and are grouped under the 3 ESG pillars (Environment, Social, Governance).

Societe Generale Private Wealth Management (SGPWM)

Societe Generale Private Wealth Management (SGPWM) is an UCITS and AIFM management company operating under the authority of the Luxembourg regulator, the CSSF (Comité de Surveillance du Secteur Financier). Subsidiary of Societe Generale Luxembourg, SGPWM offers investment solutions dedicated to large institutional and retail investors.

- A local player for its clients and partners, it is backed by a global network and thus benefits from a wide range of expertise.

- As a committed player, it takes into account environmental, social and governance (ESG) risks and factors in all its investment processes.

In 2008, SGPWM designed the Luxembourg UCITS Moorea Fund, which provides access to Société Générale Private Banking's management expertise, notably in equities, bonds, structured products, multi-asset classes and absolute return. Moorea Fund has 16 sub-funds with 2.4 billion assets under management.

For more information, we invite you to consult the complete prospectus of the sub-funds, the DICI, the periodic reports, the annual financial statements and the articles of association, available free of charge on

www.sgpwm.societegenerale.com

The Key Investor Information Document should be read before making any investment decision.

SG 29 HAUSSMANN

SG 29 Haussmann S.A.S, a subsidiary of Societe Generale, is the management company dedicated to the Group's various clients, the clients of the network, those of the Private Bank in France and certain institutional clients of the Societe Generale Group.

- A local asset management company for its clients and partners, drawing on the expertise of Societe Generale Group,

- A committed asset management company, taking into account the challenges of sustainable development in its investments. The management teams, with various expertise, offer a wide range of solutions ranging from fundamental expertise in equity and bond management to structured product management.

<https://sg29haussmann.societegenerale.fr/en/>

Societe Generale Private Banking

Societe Generale Private Banking, the Societe Generale group's wealth management arm, is one of Europe's leading private banks, with EUR 119 billion of assets under management at the end of December 2019.

With 2,500 staff in 15 countries around the world, Societe Generale Private Banking offers expertise in wealth management solutions to entrepreneurs and High Net Worth Individuals, giving access to a comprehensive range of expertise: wealth planning, financing, corporate solutions, investment solutions, portfolio management, art & philanthropy advisory.

The expertise of its private banking teams in wealth planning, investment advisory and financing solutions regularly receives Awards. In 2019 and 2020, the bank was voted :

- Best Private Bank for Structured Products (Global Private Banking Innovation Awards 2021)
- Best Wealth Planning team (WealthBriefing European Awards 2021)
- Outstanding Customer Relationship Service and Engagement in Switzerland (Private Banker International 2020)
- Outstanding Private Bank – Western Europe (Private Banker International 2020)
- Outstanding Private Bank for Customer Relationship, Servicing and Engagement (Private Banker International 2020)
- Outstanding Private Bank for Philanthropy Proposition (Private Banker International 2020)
- Best Private Bank for Succession Planning 2020 (PWM/The Banker Private Banking Awards 2020)
- Best Credit Provider (WealthBriefing European Awards 2020)
- Best UHNW Team (WealthBriefing European Awards 2020)
- Best Private Bank – Talent Management (WealthBriefing Swiss Awards 2020)
- Private Bank – Best Credit Provider (WealthBriefing Swiss Awards 2020)

Societe Generale Luxembourg

Present since 1893, Societe Generale Luxembourg is the oldest foreign banking institution in the Grand Duchy. Since the beginning, SG Luxembourg has contributed to the development of Luxembourg's industry and has thus been able to play a role in its emergence as an international financial center. Today Societe Generale is ranked the fourth largest bank in terms of balance sheet and the seventh largest banking employer with more than 1,200 employees. Société Générale Luxembourg offers all the skills of a multi-business bank to its large Luxembourg and international clientele, providing a wide range of financial and investment solutions to corporate and

institutional clients, as well as to high net worth individuals (private banking in continental Europe from its offices in: Luxembourg, Switzerland, Monaco, Italy and Germany), supported by an active trading room. True to its commitment, Societe Generale Luxembourg works every day with its teams to build a better and sustainable future together with its clients by providing responsible and innovative financial solutions.

For more information, visit our web site www.societegenerale.lu

Societe Generale

Societe Generale is one of the leading European financial services groups. Based on a diversified and integrated banking model, the Group combines financial strength and proven expertise in innovation with a strategy of sustainable growth. Committed to the positive transformations of the world's societies and economies, Societe Generale and its teams seek to build, day after day, together with its clients, a better and sustainable future through responsible and innovative financial solutions.

Active in the real economy for over 150 years, with a solid position in Europe and connected to the rest of the world, Societe Generale has over 131,000 members of staff in 66 countries and supports on a daily basis 26 million individual clients, businesses and institutional investors around the world by offering a wide range of advisory services and tailored financial solutions. The Group is built on three complementary core businesses:

- **French Retail Banking** which encompasses the Societe Generale, Credit du Nord and Boursorama brands. Each offers a full range of financial services with omnichannel products at the cutting edge of digital innovation;
- **International Retail Banking, Insurance and Financial Services to Corporates**, with networks in Africa, Russia, Central and Eastern Europe and specialised businesses that are leaders in their markets;
- **Global Banking and Investor Solutions**, which offers recognised expertise, key international locations and integrated solutions.

Societe Generale is included in the principal socially responsible investment indices: DJSI (Europe), FTSE4Good (Global and Europe), Bloomberg Gender-Equality Index, Refinitiv Diversity and Inclusion Index, Euronext Vigeo (Europe and Eurozone), STOXX Global ESG Leaders indexes, and the MSCI Low Carbon Leaders Index (World and Europe).

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