UBS makes sustainable investments its preferred solution for clients of its USD 2.6 trillion global wealth management business

UBS is the first major global financial institution to recommend sustainable over traditional solutions for private clients investing globally

Managing approximately half a trillion US dollars in core sustainable assets, this reinforces UBS’s nearly 25-year track-record in sustainable investing across all its business divisions

Zurich, 10 September 2020 – UBS, the world’s leading wealth manager and sustainable investment manager, today announced that sustainable investments are now the firm’s preferred solution for private clients investing globally. Managing USD 488 billion in core sustainable assets, UBS is the first major global financial institution to make this recommendation.

While traditional investments will remain most suitable in some circumstances, UBS believes a 100% sustainable portfolio can deliver similar or potentially higher returns compared to traditional investment portfolios and offer strong diversification for clients investing globally. Year to date, major sustainable indices have performed better than traditional equivalents.

“The shift in preferences toward sustainable products and services is only just beginning,” said Iqbal Khan, Co-President of UBS Global Wealth Management. “We believe sustainable investments will prove to be one of the most exciting and durable opportunities for private clients in the years and decades ahead.”

“COVID-19 has put the exclamation point on one of the most important shifts in financial services in a generation,” said Tom Naratil, Co-President of UBS Global Wealth Management and President of UBS Americas. “The pandemic has brought the vulnerability and interconnected nature of our societies and industries to the forefront of investors’ minds and shown that sustainability considerations cannot be ignored.”

With a nearly 25-year track-record in sustainable investing, UBS’s award-winning team was the first to develop fully diversified sustainable portfolios for private clients, which have now been tested through both bull and bear markets.

“Not all sustainable investments are created equal,” said Mark Haefele, Chief Investment Officer of UBS Global Wealth Management. “Investors need a properly diversified sustainable portfolio that has the flexibility to source new opportunities and consider new risks. A well-designed sustainable portfolio can adapt to evolving market and economic environments, and help clients weather the kind of volatility that we expect to persist throughout much of the decade ahead.”

1 2019 UBS Sustainability Report
2 2020 Euromoney Private Banking and Wealth Management Survey for Best Bank for ESG/Social Impact Investing
“Sustainable finance is a firm-wide priority for UBS and our aim is to help clients take advantage of new opportunities and manage 21st century risks more smartly,” said Huw van Steenis, Chair of UBS’s Sustainable Finance Committee and Senior Advisor to the CEO. “As sustainable finance has moved into the mainstream, it is a critical component for clients and a strategic growth opportunity for UBS.”

About UBS

UBS provides financial advice and solutions to wealthy, institutional and corporate clients worldwide, as well as private clients in Switzerland. UBS’s strategy is centered on our leading global wealth management business and our premier universal bank in Switzerland, enhanced by Asset Management and the Investment Bank. The bank focuses on businesses that have a strong competitive position in their targeted markets, are capital efficient, and have an attractive long-term structural growth or profitability outlook.

UBS is present in all major financial centers worldwide. It has offices in more than 50 regions and locations, with about 31% of its employees working in the Americas, 32% in Switzerland, 19% in the rest of Europe, the Middle East and Africa and 18% in Asia Pacific. UBS Group AG employs over 67,000 people around the world. Its shares are listed on the SIX Swiss Exchange and the New York Stock Exchange (NYSE).

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