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News Release

UBS Global Wealth Management expands sustainable investing offering to include personally tailored sustainability advice

New advisory offering helps clients align their investment portfolios with their sustainable preferences and values

Zurich, 14 July 2021 – UBS, the world’s leading wealth manager and sustainable investment manager, today announced its next step in providing personalized, tailored sustainable investing advice for its wealth management clients. Following UBS Global Wealth Management’s decision to make sustainable investments the preferred solution for private clients investing globally, the new advisory solution allows clients to tailor their sustainable investments to align with their personal preferences. These steps reflect UBS’ continued investment in sustaining its market leadership in sustainable finance.

Clients are demanding advice that is tailored, personalized, and in line with their own values. While some may prefer to tilt portfolios toward companies tackling climate change, others will want to focus more heavily on those producing sustainable products and services. UBS is proud to continue the evolution of sustainable investing and help drive private capital towards a sustainable future by delivering relevant, timely and actionable investment ideas to clients based on what’s important to them.

With the new offering, clients can tailor the advice they receive along 6 sustainable investing topics: Climate change, Water, Pollution and waste, People, Products and services, and Governance. These have been identified by UBS Global Wealth Management’s Chief Investment Office as being those that are most important to drive businesses and industry to a sustainable future.

UBS builds on a proprietary approach which sources ESG data from multiple providers and applies an in-house algorithm to assess the sustainability of companies across these six topics. Portfolios are constructed using client-personalized hierarchy of investment instruments, leading to unique outcomes for each client, aligned with their personal preferences and values.

“Investing sustainably is at the core of our thinking about the future of investing,” said **Mark Haefele, Chief Investment Officer of UBS Global Wealth Management**. “Now, for the first time our clients have a possibility to express their preferences and have those reflected systematically in the investment advice they receive”

“Clients can tailor their mandate based on the SI topics they care about, and the business activities they want to exclude from their portfolios. We enable our clients to align their investments with their own Sustainable Investing preferences.” said **Bruno Marxer, Head CIO Global Investment Management**. “By enabling clients to tailor their sustainable investing profile to fit their personal preferences, we are bringing the best of our traditional advisory services but enriched by personalized and relevant sustainable investing advice.”

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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