

Steer your investment portfolio to more sustainability

It's easy with UBS Sustainability Analytics

Align your financial investments with your values and demonstrate your environmental, social and governance responsibility by actively including sustainability criteria in your portfolio strategy.

Sustainable investing is not just another solution. It's an investment philosophy that takes into account the environmental, social and governance (ESG) challenges our world is facing. There's a clear trend towards refocusing investments to achieve sustainable development goals and support a low-carbon economy. The time for sustainable action is now. But to transform your sustainable investment philosophy into actionable investment decisions, you need appropriate, specific and convenient transparency and insight into your portfolio.

UBS Sustainability Analytics

UBS Sustainability Analytics links sustainable impact with financial returns in a fully transparent manner. You gain a competitive advantage with enhanced portfolio analysis, enriched data, and digital reporting. Fully embedded in our comprehensive digital portfolio analytics offering, UBS Sustainability Analytics makes it easy to assess the environmental, social and governance aspects of your investment strategy.

Using a network of specialized data providers, the analysis offers daily online monitoring of critical business activities and the sustainability ratings of individual investments and funds. Furthermore, UBS's proprietary sustainability methodology gives you transparency on the ESG factors that are most important to you. Graphs and tables make it easy to quickly understand the data and the trends.

The climate impact of your portfolio can be assessed by carbon footprint and carbon intensity figures.

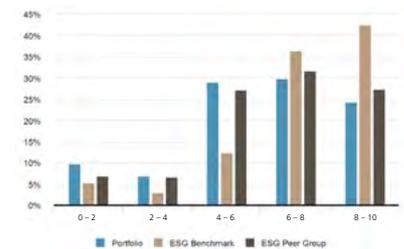
UBS Sustainability Analytics delivers numerous benefits

- Online dashboards available on the UBS Asset Wizard
- ESG ratings sourced daily from multiple specialized ESG data providers
- Screening for controversial business activities
- State-of-the-art carbon emission figures
- Benchmark and peer group comparisons
- Easy-to-use drill-down functions for in-depth analysis

Average ESG Rating



ESG Rating Coverage
% of Portfolio Market Value Normalized



Dynamic online data visualization

Analyze the ESG impact of your portfolio by choosing from three dedicated sustainability online dashboards in UBS Asset Wizard. Monitor your portfolios easily and with full transparency at any time and from anywhere. ESG ratings will be applied to your portfolio figures every day, which ensures your data is up-to-date at all times. To help you discover critical exposures and deviations from your strategy, we give you drill-down functionalities along various parameters, dynamic data analysis capabilities, and clear visualizations of market and sustainability data.

State-of-the-art carbon emission figures

Check your exposure to climate risks with a single click. Our carbon emission figures help you meet your requirements using a powerful approach to measuring the climate impact of your investment portfolio. There are two main metrics used by investors for calculating carbon impact:

- **Carbon Footprint:** emissions per USD invested. This metric displays how many tons of CO₂ an investor is financing in relation to their ownership of a certain company or portfolio. A carbon footprint is the total greenhouse gas emissions released into the atmosphere due to the activities of a particular company. It is measured in carbon dioxide equivalents (CO₂e).
- **Weighted Average Carbon Intensity (WACI):** This metric measures exposure to carbon-intensive companies, expressed in tCO₂e/mUSD revenues, while applying a portfolio weight to allow for comparison.

Benchmark and peer group comparison

No matter how big or small your query, or the size or complexity of your portfolio, UBS Sustainability Analytics give you answers when you need them. See how sustainable your portfolio actually is by comparing it to a benchmark or even a peer group consisting of similar investors. We can provide assessments covering a closed universe of benchmarks as well as individual investment categories. A direct comparison between your own assets and the mandates of your peers makes it easier to evaluate your relative ESG position.

Easy-to-use drill-down functions

Compare carbon and ESG data, risk and return across your asset managers, asset categories, or investment strategies, and decide which ESG aspect is most important to you. Perform customized analysis of your wealth according to your needs, and gain greater understanding of how to align your financial strategy with your sustainability values. Special features such as an analysis tree and analysis matrix let you break down and analyze your portfolio using assessment criteria that you define.

Business Activity Check (BAC)

Our business analysis gives you transparency by scrutinizing your portfolio for exposure to potentially critical industries. A detailed asset breakdown of all affected investments measured by revenue drivers above a certain threshold allows you to compare your investment allocation by sector. So you benefit from simplified management of your investment universe through greater transparency on undesirable businesses.



Adult entertainment



Nuclear power



Alcohol



Tobacco



Gambling



Weapons



GMO

How do we get our ESG data?

We have developed an in-house proprietary methodology to generate sustainability scores. The process relies on data sourced from multiple specialized ESG data providers selected according to their area of expertise, covering nearly 11,000 equity and bond issuers in 170 countries. Our methodology is also in line with the Sustainability Accounting Standards Board (SASB) Materiality Map, which identifies the sustainability issues that impact value creation and financial performance. We have identified six key sustainability topics that encompass the major sustainable development challenges faced by, and impacted by, both corporations and governments. These topics have been defined following a review of current frameworks and practices in the sustainable investing industry, the availability of reliable corporate data on these topics, and feedback received from investors.

Please contact our dedicated Asset Servicing experts to help you getting access to the UBS Sustainability Analytics module.

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