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Sustainable Investing with abrdrn

Invest today, change tomorrow

June 2023

abrdrn.com

abrdn Sustainable Investing

At abrdn, environmental, social and governance (ESG) considerations have been an integral part of our decision-making process for over 30 years.

By harnessing the power of investment, we're dedicated to creating more opportunity for our clients - and more positive impact for the world around us.

We use our worldwide investment expertise and local market resources to seek out investment opportunity globally. Through active investment, stewardship and innovation, we aim to deliver the most sustainable and future-fit investment solutions to help every client achieve more with their capital.



Global and embedded expertise

for comprehensive analysis

Our global Sustainability Group partners with experts embedded within asset class and business functions to offer truly comprehensive investment-critical insight.

c.30

members of our central Sustainability Group

c.30

dedicated ESG professionals across our business

700+

investment professionals trained on sustainable investing and proprietary tools

Source: abrdn, March 2023.



Proprietary research and tools

for enhanced investment insight

Our proprietary in-house research and tools complement a combination of external data sources. This allows us to undertake well-rounded and independent analysis, as well as more rigorous reporting. Combined, we can potentially offer unique insights to our clients on a range of sustainability issues.

Our proprietary tools

- Climate Scenario Analysis Tool
- Carbon Footprinting Tool
- ESG House Score
- Engagement Tool



Active ownership

For enhanced outcomes and value

We actively engage with companies throughout the investment lifecycle, as well as undertaking proxy voting and advocacy activities. We believe that this drives better investment returns, protecting and enhancing value for our clients.



Investment thesis & tools



- Active engagement
 - Advocacy
 - Proxy voting



Protecting and enhancing long-term value

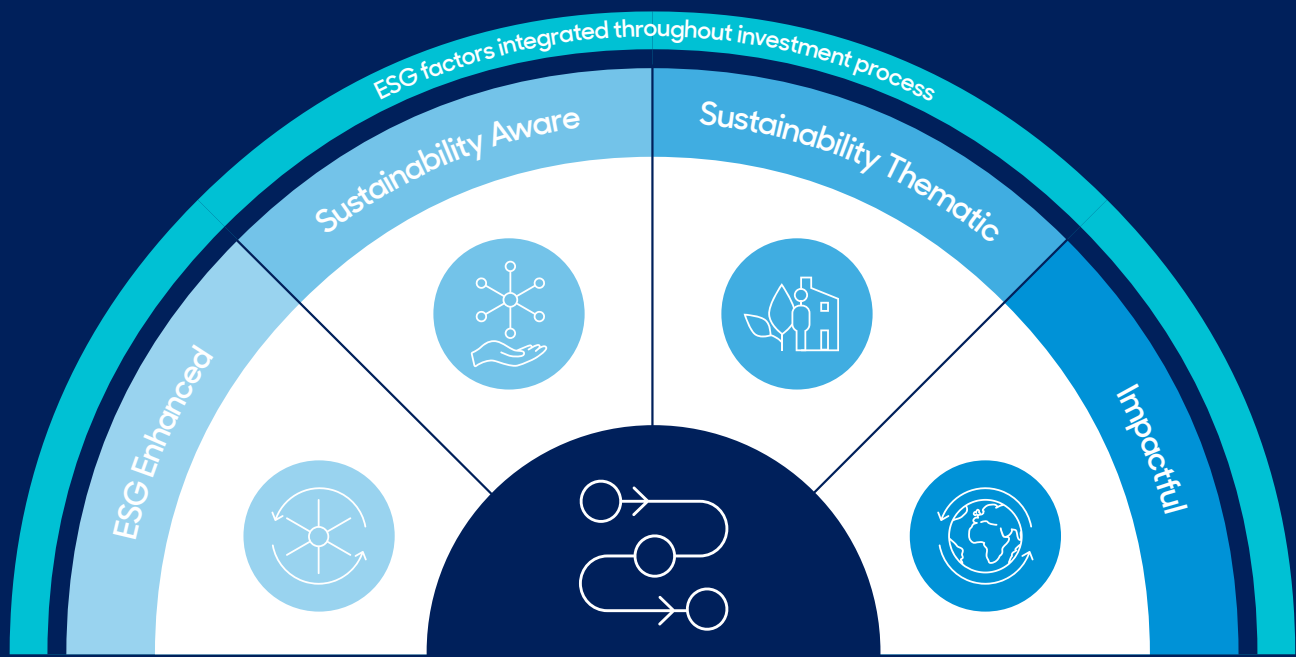




abrdn Sustainability+ Product Framework

abrdn portfolio solutions incorporating sustainability factors which may include specific sustainable objectives.

The abrdn Sustainability+ Product Framework is abrdn's own methodology for our range of solutions within this framework only. It serves as a basis for defining targets and metrics to measure our investment solutions against sustainability progress in various defined areas. Our framework may relate to regulatory requirements like SFDR but is not purposefully designed to match any one current or future taxonomy system. Instead, it is dynamic and we will regularly review and amend it as required to comply with a range of applicable regulatory requirements.



ESG Enhanced

For investors focused on enhancing ESG integration with portfolio-level sustainability targets and negative filters.

Portfolio solutions that include negative exclusions and may include ESG and carbon targets.



Sustainability Thematic

For investors interested in specific sustainable themes.

Portfolio solutions with a clear objective to target specific sustainability-related thematic opportunities such as climate change, biodiversity, and water.



Sustainability Aware

Portfolio solutions that proactively manage and target alignment of environmental or social characteristics through specific sustainability targets, negative exclusions and carbon commitments.

Additional measures may include positive screens, and an aim to allocate to sustainable companies/activities.



Impactful

For investors targeting specific and measurable sustainable objectives.

Portfolio solutions that target a defined sustainable objective. For example, a material alignment to the UN Sustainable Development Goals, or to deliver intentional, measurable, positive social or environmental impacts.

Our Goal

To help our clients achieve their long-term investment aims.

We have developed a number of sustainable investment solutions¹ that cater for our clients' different sustainability preferences, financial ambitions, and tolerances to risk.

SFDR Alignment	Article 8		Article 9	
	Framework			
Region	ESG Enhanced	Sustainability Aware	Sustainability Thematic	Impactful
Global	Equities: Global Innovation Global Smaller Companies Global Midcap Equity Fixed Income: Total Return Credit Multi-Asset: Responsible Global Asset ETF (Exchanged-Traded Funds): Global Real Estate Active Thematics	Equities: Global Sustainable Equity Fixed Income: Global Corporate Sustainable Bond	Equities: Global Climate and Environment Equity Fixed Income: Climate Transition Bond Multi-Asset Climate Opportunities	Equities: Global Equity Impact
Emerging markets	Equities: Emerging Markets Equity Emerging Markets Infrastructure Equity Fixed Income: Emerging Markets Corporate Bond	Equities: Emerging Markets Sustainable Equity		Equities: Emerging Markets SDG Equity Fixed Income: Emerging Markets SDG Corporate Bond
Asia Pacific	Equities: Asian Smaller Companies Indian Equity	Equities: China A Sustainable Equity All China Sustainable Equity Japanese Sustainable Equity Japanese Smaller Companies Fixed Income: Asian Credit Sustainable Bond		Equities: Asian SDG Equity
Other regions (excl. APAC)	Equities: European Equity Dividend European Equities	Equities: European Sustainable Equity Europe ex UK Sustainable Equity Sustainable Equity UK Sustainable Equity Fixed Income: US Dollar Credit Sustainable Bond Euro Corporate Sustainable Bond		

¹Note: the above solutions are provided to illustrate our range of capabilities only and may not be available in all jurisdictions.

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Sustainable Finance Disclosure Regulation (SFDR)

Introduced by the European Commission and effective in March 2021, SFDR means financial market participants and advisers have to provide more sustainability related information. The goal is to ensure investors have the information they need to make investment decision in line with their sustainability goals. It also seeks to avoid the 'greenwashing' of financial products and advice.

Greenwashing is when a company misleads investors about its environmental credentials. Companies must categorise any financial product sold in the EU as Article 6, 8 or 9 (there's no 7).

The abrdn Sustainability+ Product range is aligned with SFDR.

Article 8

We manage a wide range of products that are classified as Article 8 under SFDR. Their objective is to promote social and/or environmental characteristics (and follow good governance practices). These funds can follow a range of different approaches to achieve this aim. However, most of our options utilise a combination of 'best-in-class' active selection, as well as exclusions to avoid industries and companies at odds with the funds' objectives. These include our Sustainability+ product range, and several other investment solutions. Details of available funds can be found on our local websites.

As well as our wide range of Article 8 and 9 funds, we provide sustainable solutions in local and regional structures, tailored to the sustainable requirements of those markets.

Article 9

We believe it is possible for our clients to seek a financial return while addressing the world's major challenges. These include climate change, inequality, and unsustainable production and consumption. That's why we have developed a number of strategies that are classified Article 9 under SFDR.

An Article 9 fund is defined as "a fund that has sustainable investment as its objective or a reduction in carbon emissions as its objective." Further, Article 9 funds must:

- incorporate good governance into the investment strategy (i.e. assess employee relations, board structure, remuneration and more)
- assess the portfolio against the principle of "do no significant harm".

We have seven SICAV Article 9 funds covering impact investing, climate-related solutions and those aligned with the UN's Sustainable Development Goals. As at March 2023, we had 50 publicly available Article 8 funds – with more to follow.

You can find out more detail on our [Sustainable Investing](#) webpage.



Important Information

This communication constitutes marketing, and is available in the following countries/regions and issued by the respective abrdn group members detailed below. abrdn group comprises abrdn plc and its subsidiaries: (entities as at 28 November 2022)

Europe¹, Middle East and Africa

¹ In EU/EEA for Professional Investors, in Switzerland for Qualified Investors – not authorised for distribution to retail investors in these regions

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For more information visit abrdn.com

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