

30 September 2021

News Release

Robeco partners with UBS to launch Engagement Fund focused on Sustainable Development Goals

Zurich, 30 September 2021 – Robeco has launched its RobecoSAM Global SDG Engagement Equities fund, developed in partnership with UBS Global Wealth Management (GWM). This is Robeco's second SDG-focused equities fund; in 2018 the asset manager launched RobecoSAM Global SDG Equities.

As exclusive partner for the six months following the launch of the fund, UBS GWM, the world's leading wealth manager with a globally diverse client base, has initiated funding this month, with a target to invest USD 1.5 billion.

SDG Engagement Equities is a high conviction strategy with a sustainable investment objective to drive a clear and measurable improvement in a company's contribution to the United Nations Sustainable Development Goals (UN SDGs) over three to five years. The objective is to motivate invested companies to improve their fulfilment of the UN SDGs by actively engaging and having an active dialogue with them. Additionally, the fund aims to provide long term capital growth and to integrate ESG considerations, while at the same time integrating sustainability risks in the investment process. The benchmark is the MSCI All Country World Index (Net Return, USD).

The RobecoSAM Global SDG Engagement Equities fund is run by a core team of seasoned professionals from Robeco's Fundamental Equities, Emerging Markets Equities, Active Ownership and SI Research. Michiel Plakman is the fund's lead portfolio manager, supported by Daniela da Costa, Peter van der Werf, Giacomo Moroni and Jan Anton van Zanten.

The launch of RobecoSAM Global SDG Engagement Equities reflects the shared conviction of Robeco and UBS that engaging and having an active dialogue about SDG's is vital in supporting positive change that benefits people and planet.

Reto Eisenhut-Quinter, Head of Wholesale Robeco Switzerland: "Robeco's strong track record in sustainability engagement perfectly fits the aim of this fund which is to drive clear and measurable improvements in a company's contribution to the SDGs while achieving attractive investment returns for our clients. We are excited to have our close and longstanding client UBS as our launch partner and look forward to providing our other clients with an excellent opportunity for long-term capital growth through active engagement and dialogue on SDGs."

Bruno Marxer, Head of Global Investment Management at UBS Global Wealth Management:

"Through this collaborative effort, we connect people to contribute to a better world – and we connect attractive investment ideas with the United Nation's Sustainable Development Goals. We are proud to offer our clients exclusive access to this new sustainable investment solution."

About Robeco

Robeco is a pure-play international asset manager founded in 1929 with headquarters in Rotterdam, the Netherlands, and 17 offices worldwide. A global leader in sustainable investing since 1995, its unique integration of sustainable as well as fundamental and quantitative research enables the company to offer institutional and private investors an extensive selection of active investment strategies, for a broad range of asset classes. As at 30 June 2021, Robeco had EUR 200 billion in assets under management, of which EUR 177 billion is committed to ESG integration. Robeco is a subsidiary of ORIX Corporation Europe N.V. More information is available at www.robeco.com.

About UBS

UBS provides financial advice and solutions to wealthy, institutional and corporate clients worldwide, as well as private clients in Switzerland. UBS is the largest truly global wealth manager, and a leading personal and corporate bank in Switzerland, with a large-scale and diversified global asset manager and a focused 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.

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