

# ODDO BHF Polaris Moderate

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|                              |   |
|------------------------------|---|
| <b>Issuer</b>                | ODDO BHF Asset Management GmbH  |
| <b>Fund provider</b>         | ODDO BHF AM / ODDO BHF Trust GmbH   |
| <b>Fund type/Asset class</b> | Mixed fund  |
| <b>Legal form</b>            | FCP   |
| <b>Fund issue date</b>       | 15/07/2005  |
| <b>Last Update</b>           | 30.06.2021  |
| <b>Benchmark</b>             | 20% Stoxx 50 NR + 60% JPM EMU Investment Grade 1-10 Years + 20% JPM Cash Index Euro Currency 1M |
| <b>Tranche</b>               | -   |

|   |                                    |                                    |                         |  |
|---|------------------------------------|------------------------------------|-------------------------|--|
| <b>Risk Indicator (PRIIP)</b><br>4 of 7 | <b>Licensed in</b><br>D, A, CH, LU | <b>Classification by SFDR</b><br>- | <b>EU Taxonomy</b><br>- | <b>% of Sustainable Investments according to SFDR</b><br>- |
|---|------------------------------------|------------------------------------|-------------------------|--|

## Principal Adverse Impacts

No explicit details regarding the principal adverse impacts.

## Sustainable Development Goals

No explicit details regarding the Sustainable Development Goals

## NORMAL ALLOCATION

|                                   |              |
|-----------------------------------|--------------|
| <b>Equities</b>                   | 0 % to 40 %  |
| <b>Bonds</b>                      | 0 % to 100 % |
| <b>Money market/Bank deposits</b> | 0 % to 100 % |
| <b>Commodities</b>                | Excluded     |
| <b>Direct investments</b>         | Excluded     |
| <b>Derivatives</b>                | Excluded     |
| <b>Other</b>                      | -            |

## Sustainability approach

|   |  |
|---|--|
| <b>Principal Adverse Impacts</b>                          | -  |
| <b>Further remarks on the consideration of SDGs</b>       | -  |
| <b>Rationale behind classification according to SFDR</b>  | -  |
| <b>Engagement</b>   | Yes, organized internally  |
| <b>Voting</b>   | No   |
| <b>Best-in/of-Class</b>                                   | Best-In-Class<br>Die Bewertung jedes Investments in Bezug auf Umwelt, Soziales und Ethik / Unternehmensführung wird im Kontext zu seinen Peers bewertet; die Ergebnisse beeinflussen die Portfoliokonstruktion.  |
| <b>ESG-Integration</b>                                    | Yes<br>Die ESG-Bewertung des Investments hat Einfluss auf die Aufnahme und Gewichtung in einem Portfolio.  |
| <b>Norm-based screening</b>                               | ✓ UN Global Compact  |
| <b>Themes</b>   | -  |
| <b>Impact Investing</b>                                   | -  |
| <b>Further information on the sustainability approach</b> | Die Methodik besteht aus einer Kombination eines sektorbasierten Ausschluss mit einem Best-in-Class-Ansatz. Dadurch werden Unternehmen mit guter ESG Performance bevorzugt und grundlegende Kontroversen ausgeschlossen. Mit diesen unterschiedlichen Bewertungsansätzen wird ein überdurchschnittlich nachhaltiges Portfolio aufgebaut. |

## Research and Transparency

|  |                             |
|--|-----------------------------|
| In-house sustainability analysis                     | Yes, 3 Analysten            |
| Research partners                                    | Yes<br>MSCI, ~200 Analysten |
| Percentage of portfolio with sustainability analysis | 100 %                       |
| Strategically important suppliers included           | No                          |
| Sustainability advisory committee                    | No                          |
| Analysis of portfolio CO2                            | No                          |
| Sustainability reporting                             | No                          |
| At least monthly portfolio publication               | Yes                         |
| Certification/Label awarded by independent auditors  | -                           |

## Environmental

### EXCLUSION OF SECTORS / AREAS OF BUSINESS – COMPANIES

|  |    |
|--|----|
| Fossil fuels (Coal, Oil and Gas)         | No |
| Nuclear power (operation and components) | No |
| Green genetic engineering                | No |
| Chlorine and agrochemicals (biocides)    | No |
| Other                                    | -  |

### EXCLUSION OF BUSINESS PRACTICES – COMPANIES

|                                    |   |
|------------------------------------|---|
| Environmentally damaging behaviour | Yes                                       |
| Damage to biodiversity             | No  |
| Other                              | Ausschluss basierend auf UNGC 7, 8 oder 9 |

### EXCLUSION CRITERIA – COUNTRIES

|  |    |
|--|----|
| Non-ratification of the Paris Climate Agreement        | No |
| Non-ratification of the Protocol on Biosafety          | No |
| Non-ratification of the UN Biodiversity Convention     | No |
| Nuclear power by proportion of gross energy production | No |
| Other  | -  |

## Social

### EXCLUSION OF SECTORS / AREAS OF BUSINESS – COMPANIES

|   |                               |
|---|-------------------------------|
| <b>Weapons/Armaments</b>                      | Yes<br>5 % Turnover threshold |
| <b>Cluster bombs and anti-personnel mines</b> | Yes                           |
| <b>Weapons of mass destruction (ABC/CBRN)</b> | Yes                           |
| <b>Tobacco products</b>                       | Yes<br>5 % Turnover threshold |
| <b>Pornography</b>                            | Yes<br>5 % Turnover threshold |
| <b>Spirits/Alcohol</b>                        | No                            |
| <b>Gambling</b>                               | Yes<br>5 % Turnover threshold |
| <b>Other</b>                                  | -                             |

### EXCLUSION OF BUSINESS PRACTICES – COMPANIES

|  |     |
|--|-----|
| <b>Labour rights (ILO core labour standards)</b> | Yes |
| <b>Exploitative child labour</b>                 | Yes |
| <b>Violation of human rights</b>                 | Yes |
| <b>Animal testing</b>                            | No  |
| <b>Other</b>                                     | -   |

### EXCLUSION CRITERIA – COUNTRIES

|   |    |
|---|----|
| <b>Labour rights</b>                                      | No |
| <b>Violation of human rights</b>                          | No |
| <b>Military spending as a percentage of GDP</b>           | No |
| <b>Death penalty, torture</b>                             | No |
| <b>Countries classified by Freedom House as not free</b>  | No |
| <b>Violations of the Nuclear Non-Proliferation Treaty</b> | No |
| <b>Violations of other non-proliferation treaties</b>     | No |
| <b>Other</b>  | -  |

## Governance

### EXCLUSION OF BUSINESS PRACTICES – COMPANIES

|   |                                  |
|---|----------------------------------|
| <b>Corruption and bribery</b>                           | Yes                              |
| <b>Tax: planned avoidance &amp; detected violations</b> | No                               |
| <b>Other</b>  | Ausschluss basierend auf UNGC 10 |

### EXCLUSION CRITERIA – COUNTRIES

|                   |    |
|-------------------|----|
| <b>Corruption</b> | No |
| <b>Other</b>      | -  |

Quelle: Unternehmensangaben. | Für die Angaben der Unternehmen kann keine Haftung übernommen werden. Die Angaben dienen nur zur Information und stellen keine Beratung oder Empfehlung dar. Bitte beachten Sie den Haftungsausschluss unter [www.forum-ng.org/disclaimer](http://www.forum-ng.org/disclaimer). Das FNG-Nachhaltigkeitsprofil bietet nur einen ersten Überblick und ist kein Ersatz für eine eigenständige Analyse. Weiterführende Erläuterungen finden Sie unter [www.forum-ng.org](http://www.forum-ng.org)