

Sycomore Sélection Responsable

FR0010971705, FR0012719524, FR0013076452, FR0011169341, FR0010971721, FR0013277175

Issuer	Sycomore Asset Management
Fund provider	Sycomore Asset Management
Fund type/Asset class	Equity fund
Legal form	FCP
Fund issue date	24/01/2011
Last Update	02.10.2023
Benchmark	Euro Stoxx TR
Tranche	Private Investors Institutional Investors foundations



Risk Indicator (PRIIP)
6 of 7

Licensed in
D, A, CH, LU

Classification by SFDR
-

EU Taxonomy
-

% of Sustainable Investments according to SFDR
-

Principal Adverse Impacts



Sustainable Development Goals



NORMAL ALLOCATION

Equities	60 % to 100 %
Bonds	0 % to 25 %
Money market/Bank deposits	0 % to 25 %
Commodities	Excluded
Direct investments	Excluded
Derivatives	Excluded (for hedging only)
Other	-

Sustainability approach

Principal Adverse Impacts	<ul style="list-style-type: none"> ✓ Greenhouse Gas Emissions ✓ Water ✓ Waste ✓ Biodiversity ✓ Energy Efficiency and Fossil Fuels ✓ Social and Employee Matters
Further remarks on the consideration of SDGs	-
Rationale behind classification according to SFDR	<p>-</p> <p>Article 8 funds include selection criteria based on the SPICE rating and specific criteria according to the philosophy of each fund. These are mainly multi-thematic funds with SRI labels, with high minimum levels of sustainable investment of 50% or 70%. Sycomore Sélection Responsable promotes environmental and social characteristics and will have a minimum of 70% sustainable investments with an environmental objective in economic activities that do not qualify as environmentally sustainable under the EU taxonomy or sustainable investments with a social objective.</p>
Engagement	<p>Yes, organized internally</p> <p>🔗 Link to engagement policy</p>
Voting	<p>Yes, organized internally</p> <p>🔗 Link to voting policy</p>
Best-in/of-Class	<p>No</p> <p>Best-in-universe</p>
ESG-Integration	<p>Yes</p> <p>Our general ESG policy applies to all assets with different levels of ESG integration described in the policy: https://en.sycomore-am.com/610aa29f-https://en.sycomore-am.com/download/381500688</p>
Norm-based screening	<ul style="list-style-type: none"> ✓ UN Global Compact ✓ ILO core labour standards ✓ OECD Guidelines for Multinational Enterprises ✓ Implementation of TCFD
Themes	<ul style="list-style-type: none"> ✓ SDGs <p>Sycomore Sélection Responsable aims to deliver long-term returns in excess of those of the Euro Stoxx TR index by selecting quality companies that create sustainable value for all their stakeholders and present a discount to their intrinsic valuation. This conviction-based portfolio, unconstrained with respect to style, sector, country or market capitalization, is built on an in-depth fundamental analysis of companies, in particular on extra-financial issues (ESG), allowing a better assessment of risks and the identification of the most attractive long-term opportunities.</p>
Impact Investing	<p>-</p> <p>the impact is measured and monitored on the 3 pillars (E,S, G) and even on human rights, as the fund managers monitors closely the following impact KPIs : - On the environment pillar: Net Environmental Contribution (NEC) indicator aims to determine the contribution of the activities of a company to the ecological transition, with a rating from -100% to +100% depending of the negative or positive impact of its activities on the environment. - On the social pillar: workforce growth over three years. - On the governance pillar: percentage of women in key management roles. - On human rights: percentage of companies with commitment to respecting human rights (disclosure of a Human Rights Policy). The above ESG indicators selection aims at having a better result on at least two indicators compared to the Sub-fund's benchmark.</p>
Further information on the sustainability approach	<p>Sycomore's sustainable approach consists of a number of formalized strategies covering specific corners: > Human Capital Strategy: https://en.sycomore-am.com/download/1643227059 > Natural Capital Strategy: https://en.sycomore-am.com/download/2057656054 > Societal Capital Strategy: https://en.sycomore-am.com/download/1918454073 ; >Human Right Policy : https://en.sycamore-am.com/download/655023262 > SRI Exclusion policy: https://en.sycomore-am.com/download/569428451</p> <p>🔗 Link to sustainability approach</p>

Research and Transparency

In-house sustainability analysis	Yes, 23 including 9 SRI specialists
Research partners	<p>Yes</p> <p>ISS, MSCI, Oekom, The Good Economy, Trucost, iCare&Consult, Quantis</p>
Percentage of portfolio with sustainability analysis	100 %
Strategically important suppliers included	Yes
Sustainability advisory committee	Advisory
Analysis of portfolio CO2	<p>Yes, backward-looking indicator</p> <p>Sycomore uses the Net Environmental Contribution</p>
Sustainability reporting	<p>Yes</p> <p>https://en.sycomore-am.com/files/documents/shared_documents/Article173/sycomore_selection_responsable_en.pdf</p>
At least monthly portfolio publication	<p>Yes</p> <p>🔗 Link to monthly portfolio publication</p>
Certification/Label awarded by independent auditors	<ul style="list-style-type: none"> ✓ FNG Label ★★ ✓ Label ISR ✓ Austrian Ecolabel <p>Other</p> <p>Towards Sustainability</p>

Environmental

EXCLUSION OF SECTORS / AREAS OF BUSINESS – COMPANIES

Fossil fuels (Coal, Oil and Gas)	Yes 5 % Turnover threshold
Nuclear power (operation and components)	Yes 5 % Turnover threshold
Green genetic engineering	Yes 5 % Turnover threshold
Chlorine and agrochemicals (biocides)	Yes 10 % Turnover threshold
Other	Coal, pesticides, energy generation with high carbon intensity 5 % Turnover threshold

EXCLUSION OF BUSINESS PRACTICES – COMPANIES

Environmentally damaging behaviour	Yes
Damage to biodiversity	Yes
Other	-

EXCLUSION CRITERIA – COUNTRIES

Non-ratification of the Paris Climate Agreement	Yes
Non-ratification of the Protocol on Biosafety	N/A
Non-ratification of the UN Biodiversity Convention	Yes
Nuclear power by proportion of gross energy production	N/A
Other	-

Social

EXCLUSION OF SECTORS / AREAS OF BUSINESS – COMPANIES

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

EXCLUSION OF BUSINESS PRACTICES – COMPANIES

Labour rights (ILO core labour standards)	Yes
Exploitative child labour	Yes
Violation of human rights	Yes
Animal testing	No
Other	-

EXCLUSION CRITERIA – COUNTRIES

Labour rights	N/A
Violation of human rights	N/A
Military spending as a percentage of GDP	N/A
Death penalty, torture	N/A
Countries classified by Freedom House as not free	Yes
Violations of the Nuclear Non-Proliferation Treaty	Yes
Violations of other non-proliferation treaties	N/A
Other	-

Governance

EXCLUSION OF BUSINESS PRACTICES – COMPANIES

Corruption and bribery	Yes
Tax: planned avoidance & detected violations	N/A
Other	-

EXCLUSION CRITERIA – COUNTRIES

Corruption	N/A
Other	-

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. 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