

Press release

## **Globalance Bank becomes world's first bank to offer portfolios and investment strategies in line with the UN's two-degree climate target**

- **“Globalance 2-Degree Climate Portfolios” = 40 per cent lower CO<sub>2</sub> emissions than the MSCI World share index**
- **Investors gain transparency on climate risks and opportunities in the portfolio**
- **Sustainable portfolios in harmony with global climate targets**

*Zurich, 3<sup>rd</sup> November 2017* – At latest since the UN Climate Change Conference in Paris in 2015 and its concluding resolution to keep the global temperature increase “well below” two degrees Celsius, private and institutional investors have been focusing more intently on global climate change as well as the measures and regulations needed for climate protection. Moreover, the analysis of climate-related opportunities and risks is playing an increasingly significant role in the evaluation and actual valuation of asset classes. In the run-up to the UN Climate Change Conference in Bonn (6-17 November 2017), Globalance Bank is setting an example and, with its “Globalance 2-Degree Climate Portfolios”, is the world's first bank to present portfolios and investment strategies that are demonstrably in line with the two-degree climate target. The climate portfolios show investors which investments in their portfolio correspond to the climate target and which ones do not.

On average, the companies included in the Globalance 2-Degree Climate Portfolios generate 40 percent less CO<sub>2</sub> pollution than those represented in the MSCI World share index. In other words, the greenhouse gas emissions attributable to these Globalance investment strategies are low enough to meet the 2050 climate policy target of limiting global warming to less than two degrees Celsius as compared to the level before the start of the Industrial Revolution. Compliance with this target has been confirmed to Globalance Bank independently by two separate research firms that specialise in the study of greenhouse gas emissions and conformity with climate change limits.\*

Consequently, Globalance Bank has yet again enhanced the transparency for its investors: whilst the Globalance Footprint already offers them insight into the impact their investments have on the economy, society and the environment, the Bank now also enables them to assess the climate change opportunities and risks in their portfolio. The Globalance 2-Degree Climate Portfolios adhere to the philosophy of a “dual return”: the assets are not only sensibly structured and invested in a sustainable way, but also contribute to a holistic increase in value.

As Reto Ringger, founder and CEO of Globalance Bank, notes: “Climate change poses major challenges for the economy, politics and society and has profound consequences for entire industries and individual companies. This means that investors, too, are seeking new perspectives and innovative ways of thinking. Our 2-Degree Climate Portfolios not only address climate risks and thus offer ‘climate protection for the portfolio’ – they also enable investors to earn a return on the opportunities that arise from these changing circumstances. For example, the emerging megacities in China and India are being developed in keeping with ecological principles. Companies that meet the two-degree climate target will benefit from these developments and offer interesting investment prospects.”

Peter Zollinger, Head of Impact Research at Globalance Bank, added: “Our clients expect us to create sustainable portfolios. Limiting the consequences of climate change is one of the most critical issues for the future. The contribution of the Globalance 2-Degree Climate Portfolios towards achieving the UN COP21 climate target meets this need and provides clients with financial and ideological added value.”

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**About Globalance Bank AG**

Globalance Bank is an owner-run Swiss private bank and represents a paradigm change in banking. It advises private clients, families and foundations on how they can invest their assets for the long run, and this in a very special way: as the world’s first bank to do so, Globalance shows clients the “footprint” of their wealth on the economy, society and the environment. Globalance caters to the needs of private clients who wish to have their wealth generate not just tangible but also intangible rewards. In an independent assessment by German publisher Fuchsbriefe, Globalance Bank in 2017 was named “Best Swiss Bank”, and Switzerland’s business journal BILANZ ranked it as one of the three best private banks in Switzerland. The World Economic Forum (WEF) distinguished Globalance Bank as “Global Growth Company 2015”, the only European bank to receive that recognition. The founders of Globalance Bank were also the founders of SAM Sustainable Asset Management (today: RobecoSAM) as well as co-initiators of the Dow Jones Sustainability Index. Further information can be obtained at [www.globalance-bank.com](http://www.globalance-bank.com)

**\*Notes on methodology:**

The conformity of the Globalance 2-Degree Climate Portfolios with the UN’s two-degree climate target has been independently confirmed by the 2° Investing Initiative (London) and Carbon Delta (Zurich). Both are specialised in the analysis of greenhouse gas emissions and compliance with climate change limits. They apply different methods in accomplishing this, one of which is the use of International Energy Agency (IEA) roadmaps. These determine how the global energy mix needs to change in order to achieve the two-degree target. The subsequent portfolio analysis assesses whether or not the shares of energy-related companies included in a portfolio correspond to the roadmap. The result: the Globalance 2-Degree Climate Portfolios perform even better than the energy roadmaps prescribe. The portfolios managed by Globalance do not include any financial interests in coal or oil reserves or nuclear power plants. The proportion of renewable energy sources is more than twice as high as required.