

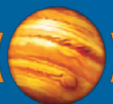
ESG & IMPACT – 2 SEITEN EINER MEDAILLE

PetersbergerTreffen 2018

Jon Wallace

Environmental & Responsible Investment
Analyst

November 2018



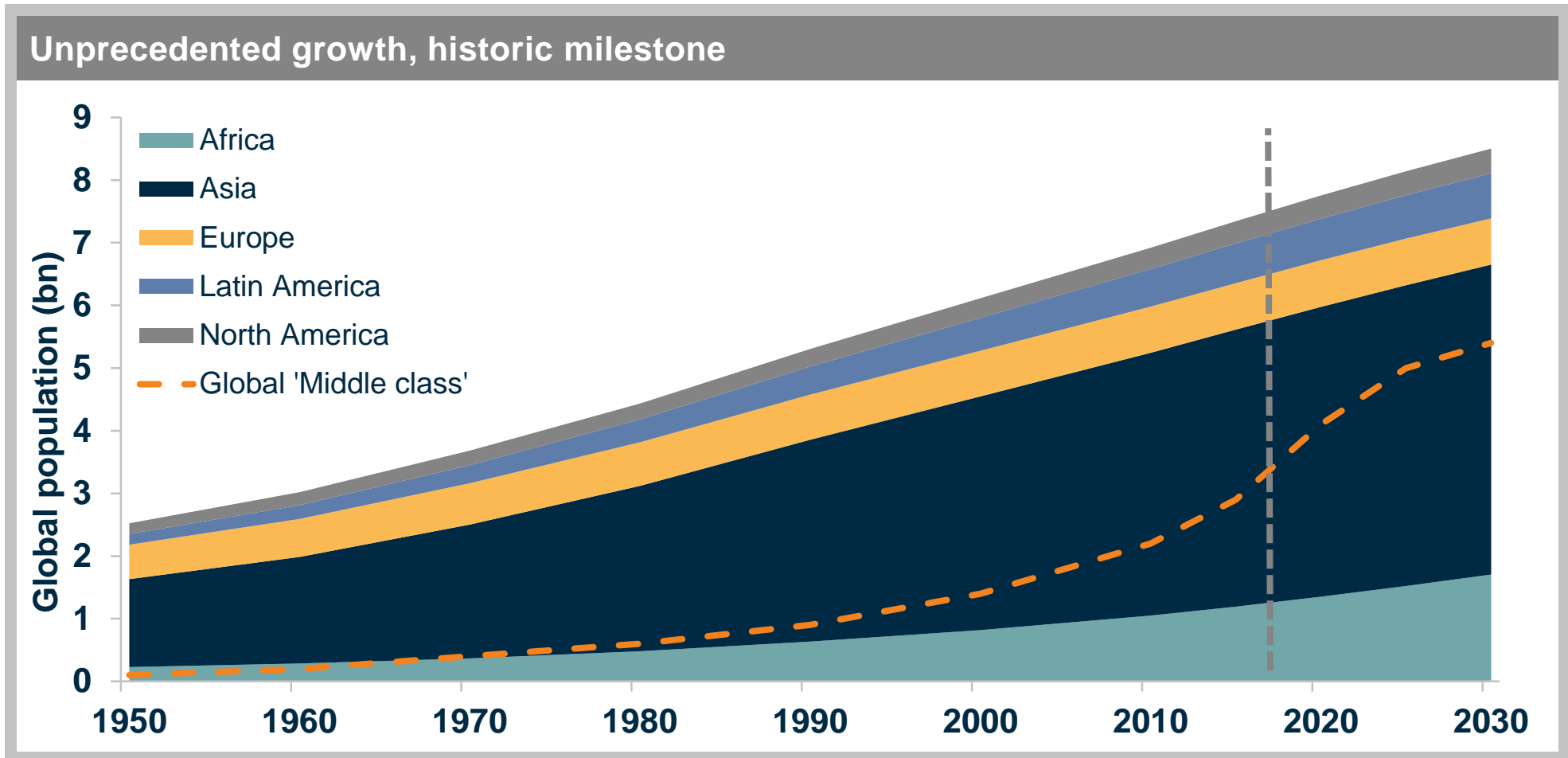
ON THE PLANET TO PERFORM

For professional and institutional investors only. Not for retail investors.


JUPITER
Asset Management

Crossing a threshold

2018: majority of the world's population have 'middle-class or rich' lifestyles for the first time

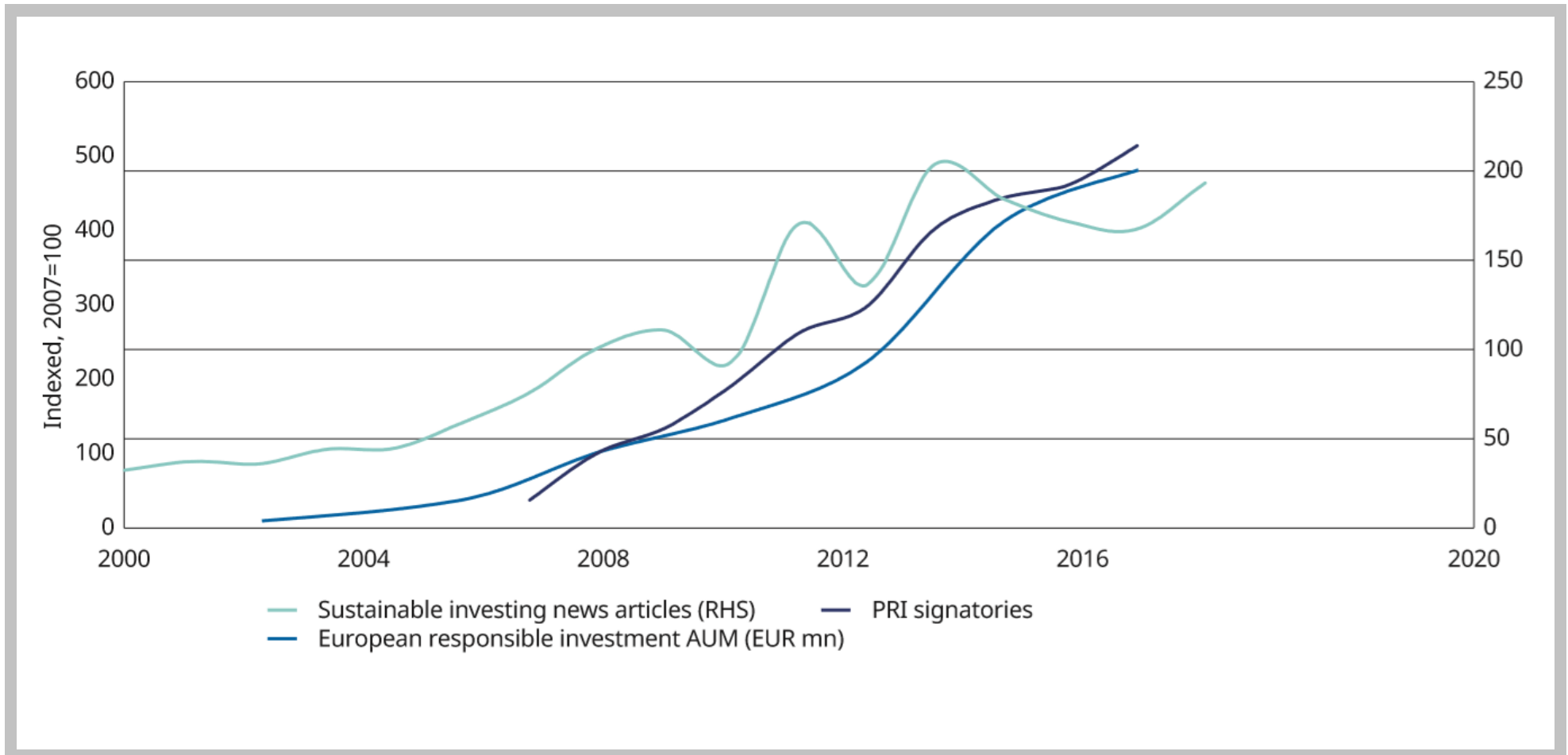


Source: Population statistics and forecasts: Probabilistic Population Projections based on World Population Prospects: 2017 Revision, UN DESA, 2017. Middle class-estimates: The unprecedented expansion of the global middle class – An update, The Brookings Institution February 28, 2017. Note: 'Middle class' is defined as comprising households with per capita incomes between \$11 and \$110 per person per day (pppd) in 2011 purchasing power parity (PPP) terms. 2030 resource demand estimates: International Energy Agency, UN Food and Agriculture Organisation; International Food Policy Research Institute.



Sustainable investing: a context of growth

And growing confusion?

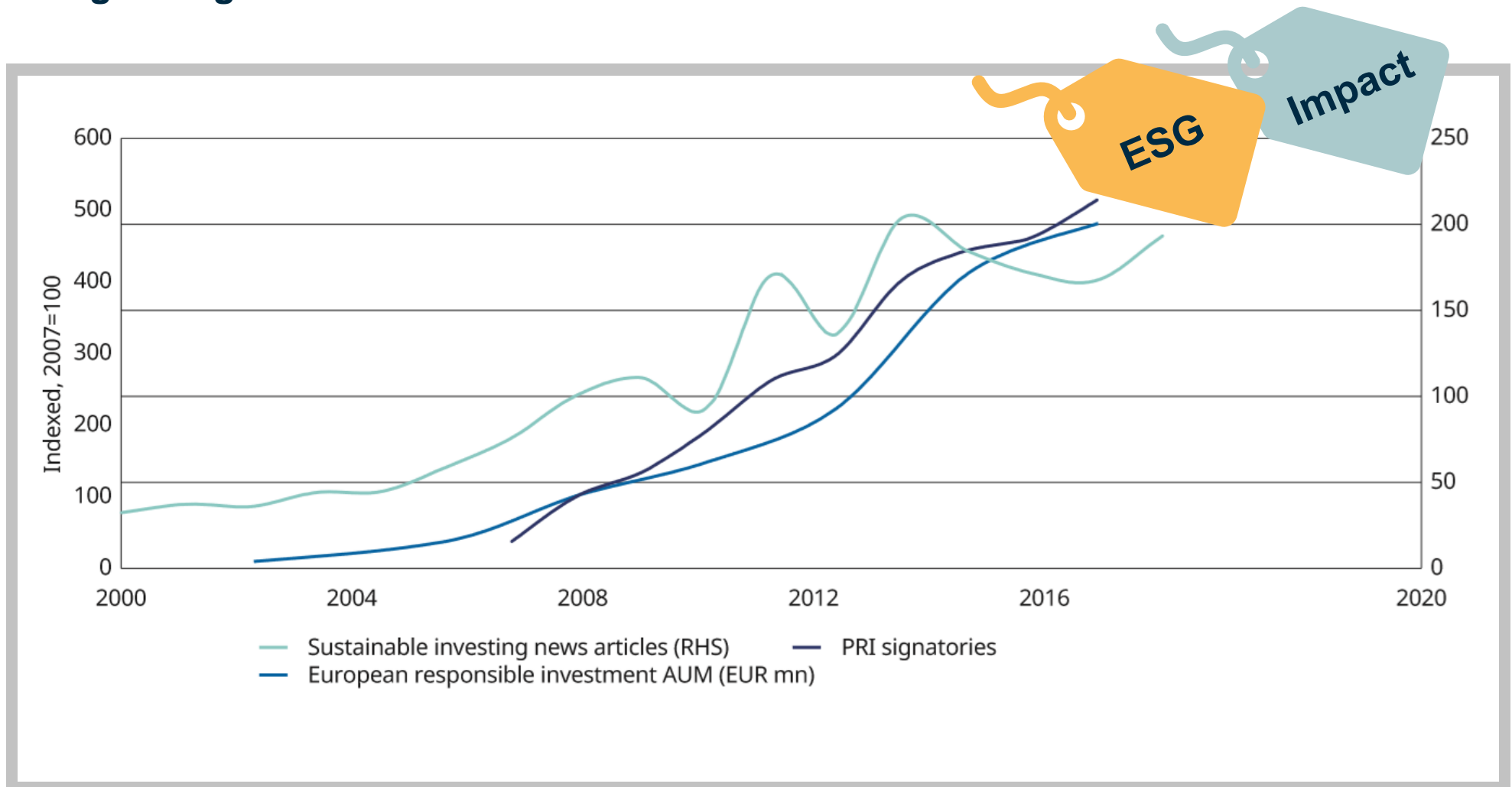


Source: Hightail (news search for articles containing “sustainable investing” relative to all articles referring to “investing”, UN PRI (absolute number of signatories) and Eurosif (combined AUM invested in different ESG strategies, adjusted for double-counting)



Sustainable investing: a context of growth

And growing confusion?



Source: Hightail (news search for articles containing “sustainable investing” relative to all articles referring to “investing”, UN PRI (absolute number of signatories) and Eurosif (combined AUM invested in different ESG strategies, adjusted for double-counting)



A framework for action

Labels converging around common themes



THE GLOBAL GOALS

For Sustainable Development



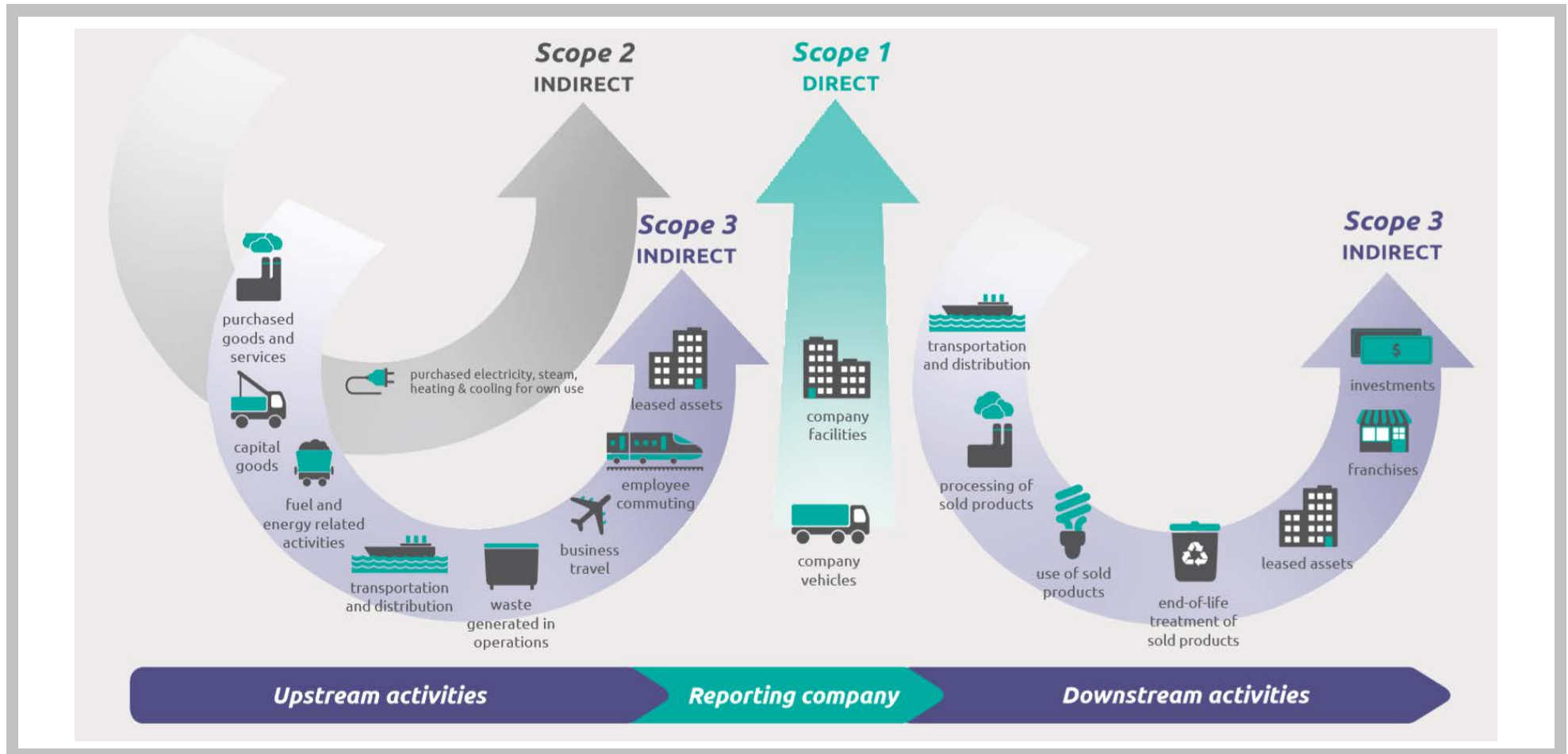
Source: <http://www.un.org/sustainabledevelopment/sustainable-development-goals/>.



For professional and institutional investors only. Not for retail investors.

Climate action

ESG and Impact – a different mindset?

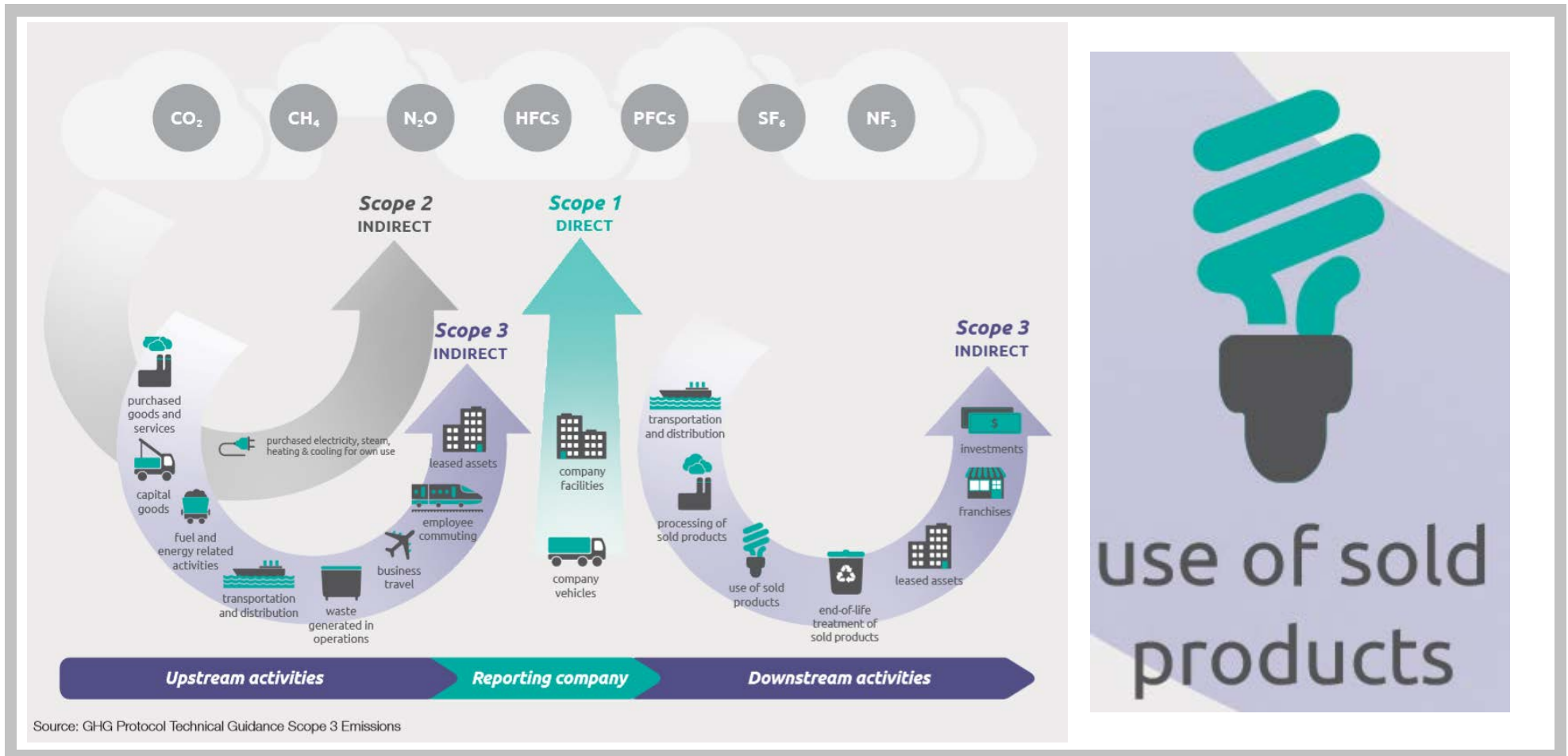


Source: Bridging low-carbon technologies, CDP 2018



Climate action

ESG and Impact – a different mindset?



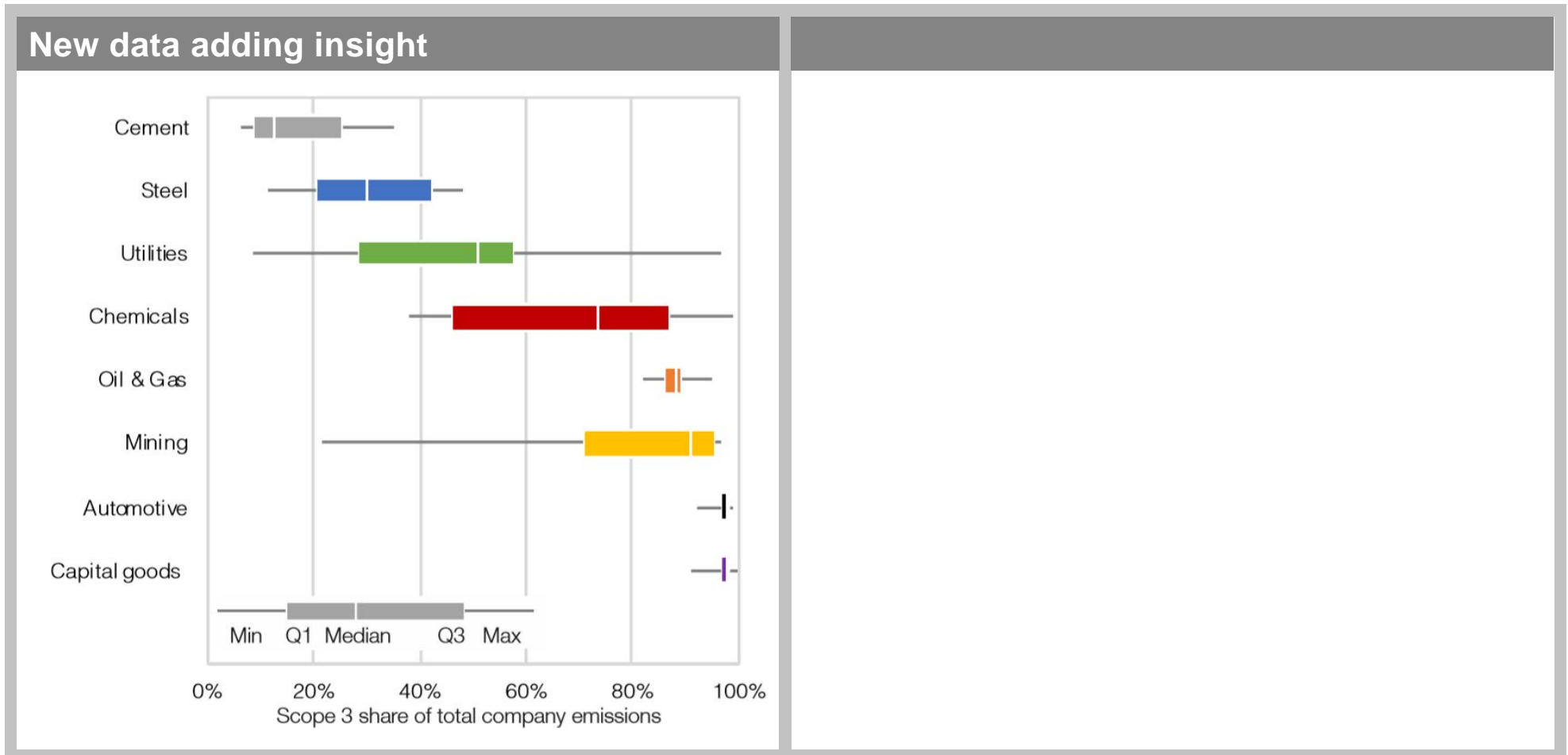
Source: Bridging low-carbon technologies, CDP 2018



For professional and institutional investors only. Not for retail investors.

A look to the horizon

SDG 13: Climate action



Source: Bridging low-carbon technologies, CDP 2018

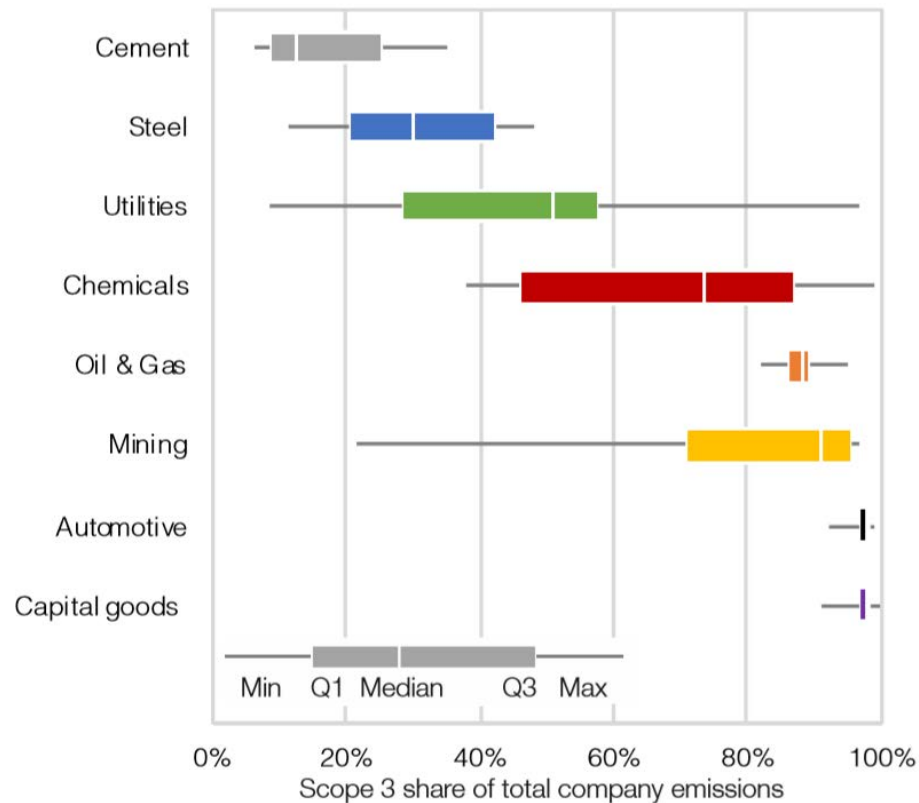


For professional and institutional investors only. Not for retail investors.

A look to the horizon

SDG 13: Climate action

New data adding insight



And supporting new regulation

“ The proposed rules will create a new category of benchmarks, comprising the **low-carbon** benchmark version of standard indices and the **positive-carbon impact** benchmarks ”



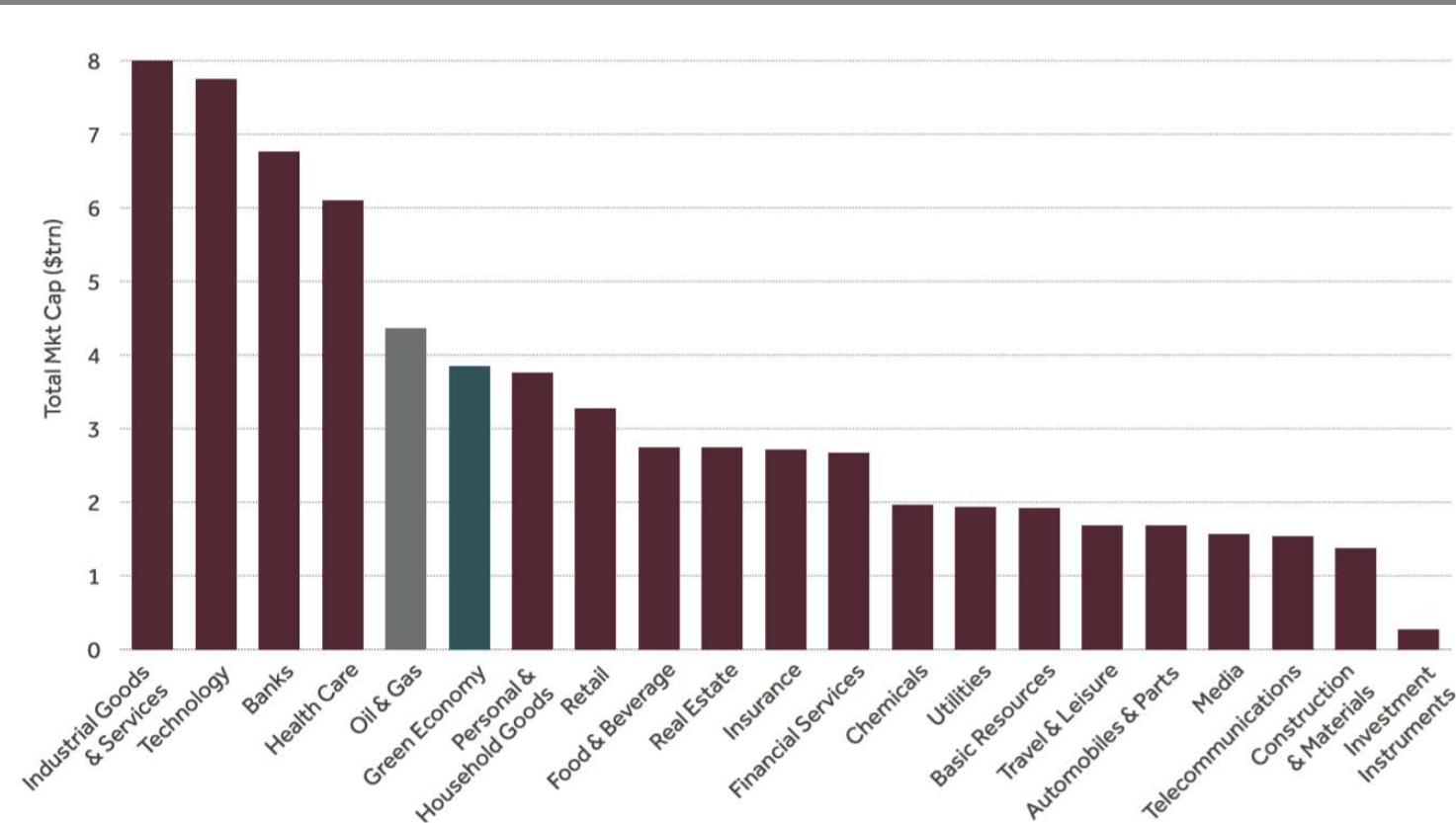
Source: Bridging low-carbon technologies, CDP 2018; European Commission press release: Sustainable finance: Making the financial sector a powerful actor in fighting climate change, 24 May 2018.



Impact: a focus on solutions

An increasingly diverse and scalable opportunity

FTSE ICB Supersectors plus green economy ranked by market capitalisation



FTSE calculate that “approximately 6% of the global listed equity market is now derived from the ‘Green Economy’: products and services in renewable and alternative energy, energy efficiency, water, and waste and pollution control.”

This represents almost US\$4 trillion in market capitalisation, similar in size to the ICB Oil and Gas Supersector.

Source: Investing in the global green economy: busting common myths, FTSE Russell (2018). Data as at 31.12.17.



30 years young

Jupiter's Global Environment and Sustainable Strategy – longstanding and pioneering

Experienced

- Environmental & Sustainable investing since 1988

Active

- We make long-term investments in companies providing solutions to global sustainability challenges

Innovative

- Now covering balanced fund as well as pure equity approaches



Disclosure

This document is intended for investment professionals and is not for the use or benefit of other persons, including retail investors.

This document is for informational purposes only and is not investment advice. Market and exchange rate movements can cause the value of an investment to fall as well as rise, and you may get back less than originally invested.

The views expressed are those of the Fund Manager at the time of preparation, are not necessarily those of Jupiter as a whole and may be subject to change. This is particularly true during periods of rapidly changing market circumstances.

Every effort is made to ensure the accuracy of any information provided but no assurances or warranties are given.

Jupiter Asset Management Limited is authorised and regulated by the Financial Conduct Authority and its registered address is The Zig Zag Building, 70 Victoria Street, London, SW1E 6SQ, United Kingdom.

No part of this presentation may be reproduced in any manner without the prior permission of Jupiter Asset Management Limited.

