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# Sustainability preferences report

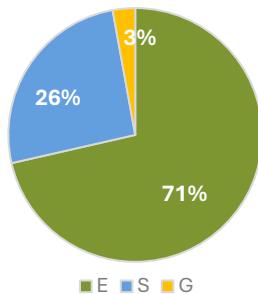
Part of the suitability assessment

Client <insert name>

Advisor <insert name>

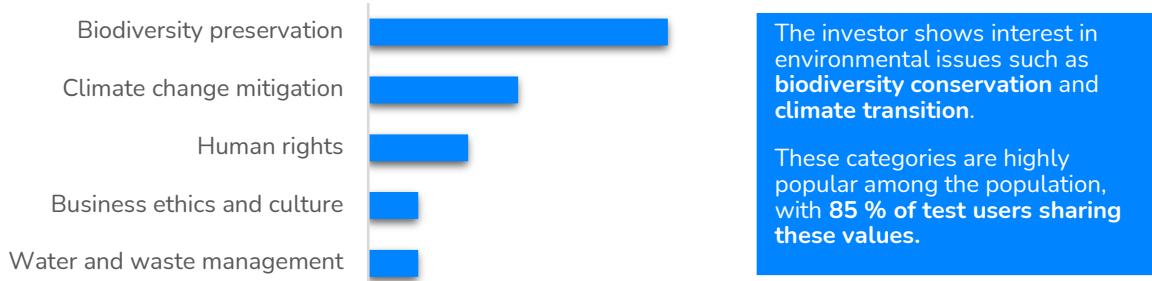
Date of survey <dd/mm/yyyy>

## Profile overview



- This profile covers 39% of respondents and is the **second-largest of the 35 sustainability profiles**.
- This type of investor strategically prioritizes ESG through asset allocation, reflecting a sophisticated understanding of how financial tools can support sustainability goals.
- Highly conscious of sustainability issues, this investor prioritises a specific ESG aspect—environmental, social, or governance—based on personal values or expertise.
- This investor values principles like Do No Significant Harm (DNSH)\*, avoiding investments in companies with poor governance, environmental harm, or unethical practices.

## Sustainability preferences



## Sustainability appetite

- This appetite level applies to **43 % of respondents**—the largest segment in our sample.
- Group members consider impact as a key factor when evaluating investments, willing to balance modest risks or returns for ventures with strong ESG credentials. They favour strategies that align sustainability goals with long-term value creation.

Score	ESG allocation
HIGH	Above 30%
MEDIUM	5 – 25%
LOW	Below 5%
NONE	No ESG allocation

## Investment funds matching this profile

Coming soon...

\***Do No Significant Harm (DNSH)** – An EU sustainability rule (Taxonomy Regulation, Art. 2(17) & SFDR) that says an investment may be called *sustainable* only if it does **not** materially damage any other environmental or social objective (e.g., climate, biodiversity, water, circular economy, workers' rights)