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Sustainability preferences report

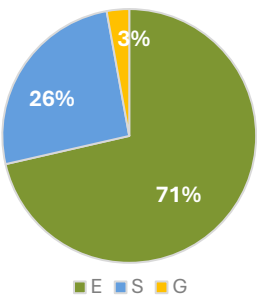
Part of the suitability assessment

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



The investor shows interest in environmental issues such as **biodiversity conservation** and **climate transition**.

These categories are highly popular among the population, with **85 % of test users sharing these values**.

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)