

The decarbonization  
megatrend

# Impact Investing

Invest in companies that contribute  
to decarbonizing the world.

Dear Sir or Madam,

The concentration of greenhouse gasses in the atmosphere, especially carbon dioxide (CO<sub>2</sub>), has reached an alarming level. The last eight years have been the eight warmest ever recorded. The extent of this observable rise in temperature is historically unprecedented.

This makes new investment strategies with tangible benefits for the decarbonization of the global economy all the more necessary.

With DecarbRevo, we are pleased to offer you an innovative asset management mandate that helps actively combat climate change through the financial industry.

This mandate prioritises companies that invest a lot of financial and human resources in decarbonization.

Kind regards,  
Zugerberg Finanz

# The decarbonization megatrend

Reducing global greenhouse gas emissions is both a key policy issue and an unprecedented investment opportunity of the 21st century.

It is essential to limit the increase in the global average temperature in this century to well below 2°C. This goal is enshrined in the Paris Agreement and applies to all countries in general, irrespective of their level of development. In order to achieve this ambitious goal, global economic activity must be decarbonized by the middle of this century at the latest, which means going climate- and CO<sub>2</sub>-neutral. This requires huge investments in renewable energies and green technologies. According to the Intergovernmental Panel on Climate

Change (IPCC), an estimated US \$4,500 billion a year is necessary to finance the investments in sustainable infrastructures and technologies needed to reach net zero by 2050. This corresponds to three to six times the financial flows currently going towards climate solutions. The leading decarbonization companies therefore rely on large amounts of additional equity and debt capital. Accordingly, the megatrend of “decarbonization” seems to present a unique investment opportunity. We firmly believe that, in addition to emission-intensive industrial

enterprises, the financial industry also has a huge responsibility to take decisive action to tackle and mitigate climate change.

Our new Revo decarbonization strategies (DecarbRevo, 3a DecarbRevo) and the AWI Decarbonization Infrastructure Debt investment group, which is accessible to institutional investors, were developed to replace passive (supposedly sustainable) investment solutions and to combine a positive effect on the global climate with attractive returns. The investments are made exclusively in compa-

nies that play an active role in the transition to a sustainable, emission-neutral world economy, i.e. the technological leaders.



# The fight against climate change

The reduction in emissions we are pursuing and promoting is essential to combating climate change. We must limit the ecological and economic consequences of climate change. At the same time, we need to achieve the global climate goals, such as the Paris Climate Agreement.



**“The sun is always shining.”**

Solar energy, or solar power, refers to the energy of solar radiation, which we can exploit in the form of electricity or heat through technology.



**“The wind is always blowing.”**

Wind energy or wind power describes the technological exploitation of wind as a renewable energy source.



**“There is a perpetual water cycle on Earth.”**

Hydropower, or water power, is a renewable energy source and refers to the generation of electricity using generators in hydropower plants.

We are pleased to present 3 examples of possible investments by way of illustration. The investment can be made by means of equity (shares) or debt capital (bonds). Please note: the companies listed here are just examples. There is no guarantee that you will be investing in these companies. All information published here is for informational purposes only and does not constitute investment advice or any other recommendation.



## Sunnova Energy

Sunnova is the leading US provider of solar and energy storage services for private households and serves over 225'000 customers worldwide. The company is growing rapidly and also offers homeowners solar services for roofs through its network of local sales and installation partners. The company develops, builds, and installs the solar energy and energy storage systems for its customers.

- In 2021, Sunnova prevented 2.6 million tonnes of CO<sub>2</sub> emissions thanks to its solar energy systems.
- Sunnova offers solar panels that also feature battery storage, among other things, so customers can use the energy reliably at any time.



## Iberdrola

A global leader in renewable energy infrastructure: the Iberdrola Group began its commitment to decarbonized energy production more than two decades ago. Since then, this business segment has constituted the absolute core of its operational activities.

- The Iberdrola Group has committed itself to reducing its CO<sub>2</sub> emissions worldwide to 50 g/kWh by 2030, which corresponds to a reduction of 86% over three decades. In addition, it aims to achieve climate neutrality by 2050.
- By 2030, Iberdrola will have invested €150 billion in renewable energy infrastructure to further advance the energy transition.



## Øyfjellet Wind

The wind farm was launched as a local initiative with broad support from the local population, industry, and decision-makers. The wind farm will contribute to jobs, growth, and development in the long term and will benefit the entire region for years to come.

- The wind power infrastructure is directly connected to the power grid to supply a nearby industrial operation (Alcoa, the world's largest aluminium producer) with renewable energy.
- There is a 15-year electricity purchase agreement in place between Alcoa and Øyfjellet Wind, which states that 100% of the electricity generated will be sold to Alcoa at fixed MWh prices.

## About Zugerberg Finanz

Zugerberg Finanz has been supporting private and institutional investors of all sizes with their investments for more than 20 years. In doing so, we rely on active, independent asset management with a domestic focus.

## Memberships in the field of sustainability

Zugerberg Finanz has been a member of the Principles for Responsible Investment (PRI) and the Institutional Investors Group on Climate Change (IIGCC) since the beginning of 2022.

Through these memberships, we are committed to taking concrete aspects of sustainability into account in all our investment decisions. Furthermore, we will be reporting transparently on our implementation in annual reports and submitting these to the official supervisory bodies of the respective initiatives for review.

**BILANZ**

Best Asset Manager in Switzerland  
2023, 2020, 2019, 2018 (1<sup>st</sup> place)  
2022, 2021 (3<sup>rd</sup> place)

**MORNINGSTAR**

5 stars for 10 years 2015–2024

**ZWEI**  
WEALTH

Rating “highly recommended”  
August 2023

**CITYWIRE**

Top 50 Asset Manager  
2023, 2022, 2021, 2020, 2019

**IIGCC**  
The Institutional Investors  
Group on Climate Change

**PRI** Principles for  
Responsible  
Investment

## Do you want to benefit from the megatrend of decarbonization as well?

The following investment options are available to you:

- DecarbRevo [www.zugerberg-finanz.ch/decarbreno-en](http://www.zugerberg-finanz.ch/decarbreno-en)
- 3a DecarbRevo [www.zugerberg-finanz.ch/3a-decarbreno-en](http://www.zugerberg-finanz.ch/3a-decarbreno-en)

For institutional investors only: AWI Decarbonization Infrastructure Debt

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