

SYZ renews exclusive sustainable investment initiative in partnership with the World Bank

Geneva, 10 September 2018 – The Advisory service of Banque SYZ capitalises on last year’s success by launching a new equity-linked bond issued by the World Bank (IBRD), linked to a basket of developed market stocks that meet SDG (Sustainable Development Goals) criteria.

Last year, SYZ was the first private bank in Switzerland to offer this type of investment to private clients. Considering the great interest gathered among investors, SYZ has decided to renew its partnership with the World Bank (International Bank for Reconstruction and Development, IBRD, Aaa/AAA) on a new equity-linked bond offering. Banque SYZ is the sole distributor of the note, a bond in Switzerland that directly connects private investors to the Sustainable Development Goals (SDGs). Returns are linked to the performance of companies advancing the global development priorities set out in the goals, such as tackling climate change, ending poverty, advancing gender equality, improving health and building sustainable infrastructure.

While ESG (Environment Social Governance) focused solutions are available, the partnership with the World Bank goes beyond these solutions by focusing on the SDGs, which are endorsed by the United Nations and will govern the UN’s global strategy until 2030. In addition, all investments will be used to finance World Bank development projects.

Led by Carole Millet and Manuel Terreault of Banque SYZ’s Advisory Team, the project respond to private investors’ aspirations, who are attracted by the combination of a performance-oriented goal and the humanistic spirit of the initiative. This project highlights the willingness of SYZ to adopt a sustainable-investment approach, driven by its capacity to offer innovative products to its clients in line with its entrepreneurial spirit.

“The economic impact of climate change is massive: it affects direct assets, damages future returns and endangers fragile economies. If the awareness to shift to low-carbon emissions is widely accepted, we need to address solutions that protect our investors’ capital and take advantage of both existing and new opportunities,” says Eric Syz, CEO of SYZ Group.

“Therefore, we are very proud to partner again with the World Bank through their investment solution supporting the Sustainable Development Goals. Innovation is one of our core values and as a responsible investor we are pleased to contribute to new solutions creating performance through investments that incorporate environmental, social and governance considerations”.

Quoting World Bank Vice President and Treasurer, Arunma Oteh, “Achieving the Sustainable Development Goals requires a fundamental shift in development finance – the active participation of private investors is key to this change. Thanks to our deepening partnership with Banque SYZ and BNP Paribas who arranged the bond, Swiss private investors will have a new opportunity to participate in a product that demonstrates the powerful role of capital markets in connecting savings with development priorities.”

The World Bank will use the proceeds to support the financing of projects that advance its goals of eliminating extreme poverty and boosting shared prosperity, and that are aligned with the SDGs. The return on investment of the bond is directly linked to the stock performance of companies included in the Solactive Sustainable Development Goals World

MV Index. The index includes 30 companies that, based on methodology developed by Vigeo Eiris' Equitics, dedicate at least one fifth of their activities to sustainable products, or are recognised leaders in their industries on socially and environmentally sustainable issues. Solactive applies volatility and diversification filters to reach the final index composition. Vigeo Eiris is a global provider of environmental, social and governance research to investors and public and private companies.

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About SYZ Group

Founded in Geneva in 1996, SYZ is a fast growing Swiss banking group exclusively dedicated to asset management, through two complementary business lines: high-end private banking and institutional asset management. SYZ offers private and institutional investors comprehensive portfolio management, with an active investment style and a focus on risk reduction that is clearly committed to providing absolute performance through alpha generation.

SYZ is an independent, family-owned company with a global footprint. The Group has a solid capital base and benefits from being privately held and independent.

www.syzgroup.com

About the World Bank

The World Bank (International Bank for Reconstruction and Development, IBRD), rated Aaa/AAA (Moody's/S&P), is an international organization created in 1944 and the original member of the World Bank Group. It operates as a global development cooperative owned by 189 nations. It provides its members with financing, expertise and coordination services so they can achieve equitable and sustainable economic growth in their national economies and find effective solutions to pressing regional and global economic and environmental problems. The World Bank has two main goals: to end extreme poverty and promote shared prosperity. It seeks to achieve them primarily by providing loans, risk management products, and expertise on development-related disciplines to its borrowing member government clients in middle-income countries and other creditworthy countries, and by coordinating responses to regional and global challenges. It has been issuing sustainable development bonds in the international capital markets for over 70 years to fund its activities that achieve a positive impact. Information on World Bank bonds for investors is available here www.worldbank.org/debtsecurities .

World Bank Bonds Use of Proceeds

The World Bank (IBRD) issues USD 50 to 55 billion in bonds for sustainable development every year. Bond proceeds are used to support the financing of sustainable development projects and programs in countries that are middle-income or creditworthy lower-income IBRD members and working in partnership with IBRD to eliminate extreme poverty and boost shared prosperity. Projects supported by IBRD are designed to achieve a positive social impact and undergo a rigorous review and internal approval process aimed at safeguarding equitable and sustainable economic growth.

About the Sustainable Development Goals (SDGs)

The Sustainable Development Goals (SDGs) are a collection of 17 interrelated global goals set out by the United Nations. Each of the broad goals has several targets. The total number of targets is 169. The SDGs cover a broad range of social development issues, such as poverty, hunger, health, education, climate change, gender equality, water, sanitation, energy, environment and social justice. The SDGs are also known as "Transforming our World: the 2030 Agenda for Sustainable Development" or Agenda 2030 in short. The goals were developed to replace the Millennium Development Goals (MDGs) which ended in 2015. Unlike the MDGs, the SDG framework does not distinguish between "developed" and "developing" nations. Instead, the goals apply to all countries.