



A CHE PUNTO SIAMO CON ESG?

**ITINERARI
PREVIDENZIALI**
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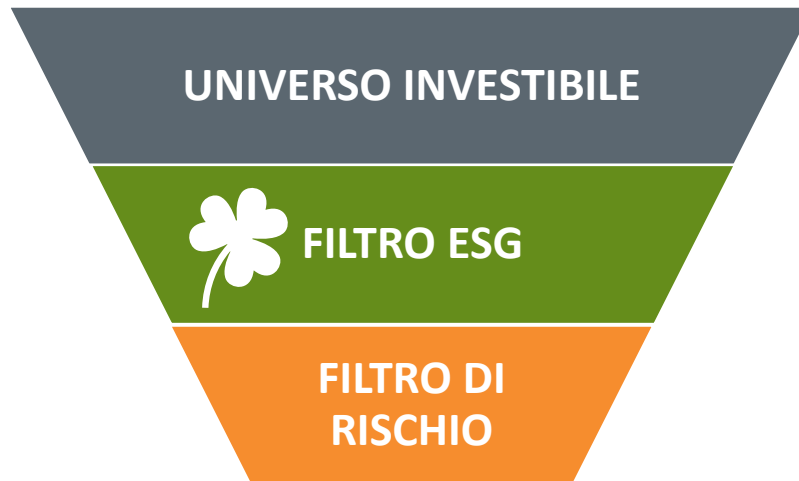
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FOR PROFESSIONAL CLIENTS ONLY.

A che punto siamo con gli investimenti ESG in WisdomTree?

1 INDICI AZIONARI PROPRIETARI



**COSTRUZIONE DEL
PORTAFOGLIO**



2 ETC SULL' ORO FISICO

**RESPONSIBLE GOLD GUIDANCE
DELLA LBMA (versione 8)**



Integrazione di **criteri ESG**
per le raffinerie nell'ultima
versione del 2019



**ETC CON GARANZIA FISICA
COSTITUITO AL 100% DA BARRE
D'ORO RESPONSABILI (POST 2019)**

Approccio ESG per gli indici azionari proprietari di WisdomTree con *Sustainalytics*



CARBONE TERMICO

Eslusione delle società che derivano più del 25% dei ricavi o della loro capacità dall'estrazione di carbone termico



TABACCO

Eslusione di tutte le società con qualsiasi coinvolgimento o proprietà significativa*

ARMİ CONTROVERSE

Eslusione di tutte le società con qualsiasi coinvolgimento o con proprietà significativa



UNITED NATIONS GLOBAL COMPACT (UNGC)

Eslusione di tutte le società non conformi ai 10 principi UNGC in materia di diritti umani, lavoro, ambiente e anticorruzione

Criteri di esclusione E(nvironmental) e S(ocial)

Top 20 aziende globali per capitalizzazione di mercato – *Sustainalytics*



CARBONE TERMICO

American Electric Power Company, Inc.
CLP Holdings Limited
PPL Corporation
Ameren Corporation
NTPC Limited
Shaanxi Coal Industry Co., Ltd. Class A
Coal India Ltd.
HK Electric Investments & HK Electric Investments Ltd.
Zhejiang Zheneng Electric Power Co., Ltd. Class A
Origin Energy Limited
AGL Energy Limited
OGE Energy Corp.
GD Power Development Co., Ltd Class A
China Resources Power Holdings Co. Ltd.
China Shenhua Energy Co. Ltd. Class H
Chugoku Electric Power Co., Inc.
Washington H. Soul Pattinson and Co. Ltd.
PNM Resources, Inc.
PGE Polska Grupa Energetyczna S.A.
PT Bayan Resources Tbk



TABACCO

Philip Morris International Inc.
Altria Group Inc
British American Tobacco p.l.c.
Japan Tobacco Inc.
Compagnie Financiere Richemont SA
ITC Limited
Seven & I Holdings Co., Ltd.
Symrise AG
Imperial Brands PLC
International Paper Company
Latour AB Investment Class B
International Flavors & Fragrances Inc.
PT Hanjaya Mandala Sampoerna Tbk
Swedish Match AB
Celanese Corporation
FamilyMart Co., Ltd.
Eastman Chemical Company
KT & G Corporation
Stora Enso Oyj Class R
WestRock Company

ARMI CONTROVERSE

Honeywell International Inc.
Lockheed Martin Corporation
Boeing Company
BlackRock, Inc.
Airbus SE
Northrop Grumman Corporation
Safran S.A.
General Dynamics Corporation
T. Rowe Price Group
BAE Systems plc
Larsen & Toubro Ltd.
Thales SA
China Shipbuilding Industry Company
Jacobs Engineering Group Inc.
Textron Inc.
Dassault Aviation SA
Rolls-Royce Holdings plc
Huntington Ingalls Industries, Inc.
Elbit Systems Ltd
CACI International Inc Class A

Source: WisdomTree. February 2021. Companies are excluded from the investable universe at the start of the screening process. Exclusion are done using industry-leading data provider Sustainalytics.

Criteri di esclusione di G(overnance)

Top 10 aziende globali non conformi ai principi UNGC – *Sustainalytics*

Johnson & Johnson
Wells Fargo & Company
Vale S.A.
Hangzhou Hikvision Digital Technology Co., Ltd Class A
Southern Copper Corporation
Volkswagen AG Pref
Freeport-McMoRan, Inc.
Grupo Mexico S.A.B. de C.V. Class B
Equifax Inc.
Swedbank AB Class A



PRINCIPI UNGC (UNITED NATIONS GLOBAL COMPACT)

DIRITTI UMANI
1: rispettare la protezione dei diritti umani proclamati a livello internazionale
2: assicurarsi che non siano complici di violazioni dei diritti umani.

LAVORO
3: difendere la libertà di associazione ed il diritto alla contrattazione collettiva
4: eliminazione del lavoro forzato e obbligatorio
5: abolizione del lavoro minorile
6: eliminazione della discriminazione in materia di occupazione

AMBIENTE
7: sostenere un approccio precauzionale alle sfide ambientali
8: intraprendere iniziative per una maggiore responsabilità ambientale
9: incoraggiare lo sviluppo di tecnologie rispettose dell'ambiente

ANTI CORRUZIONE
10: le aziende dovrebbero lavorare contro la corruzione in tutte le sue forme

Source: WisdomTree. February 2021. Companies are excluded from the investable universe at the start of the screening process. Exclusion are done using industry-leading data provider Sustainalytics.

ETF azionari proprietari con filtro ESG

Le esclusioni ESG per gli **ETF UCITS** che replicano **indici azionari proprietari** sono entrate in vigore nel 2020.



Entro il Q3 2021 applicheremo le esclusioni ESG sia ai restanti **ETF azionari UCITS** che replicano gli indici in **partnership con Nasdaq**, che all'intera gamma di **ETF obbligazionari UCITS**.

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