

# Danske Invest Allocation Horisont Balanserad Class WA



## ESG-funds

Funds that promote environmental or social factors and ensure good governance practices are called ESG funds. The funds promote ESG by investing, for example, in companies that focus on climate and employee conditions, diversity or anti-corruption. They can also work actively to influence companies to become more sustainable or to refrain from investing in companies that have a large and detrimental climate impact.

ESG funds comply with Article 8 of the EU regulation on sustainability-related disclosures in the financial services sector.

All our investment options adhere to our Responsible Investment Policy, which supports our ambition to create attractive returns for you and contribute to sustainable development. This entails, for example, that we do not invest in companies involved in controversial weapons or companies generating a significant share of revenue from tar sands, thermal coal and tobacco. In addition, we do not invest in a number of companies that violate international norms, which include contributing to climate change and water pollution, breaching human rights or involvement in corruption practices. All funds also incorporate sustainability risks as part of selecting attractive investments and exercise active ownership to influence companies in a more responsible and sustainable direction.

## Sustainability integration

- ☒ Has access to relevant sustainability data & research
- ☒ Regularly participates in sustainability education sessions
- ☒ Integrates sustainability Information in the investment analysis
- ☒ Includes material sustainability factors in investment decisions
- ☒ Conducts sustainability materiality assessments on a company/sector/country level

## Active Ownership

- ☒ Engages on a regular basis with investee companies
- ☒ Participates in investor initiatives to encourage increased transparency
- ☒ Collaborates with peers, like minded investors and other relevant parties
- ☒ Regularly votes at General Meetings
- ☒ Participates in nomination committees
- ☒ Discloses active ownership activities

## Screening & Restrictions

### PROCESS

- ☒ Negative Screening
- ☒ Positive Screening

### RESTRICTIONS

- ☒ Alcohol (5%)
- ☒ Thermal coal mining (5%)
- ☒ Commercial gambling (5%)
- ☒ Controversial weapons
- ☒ Fossil fuels (5%)
- ☒ Military equipment (5%)
- ☒ Norms
- ☒ Pornography (1%)
- ☒ Tar sands (5%)
- ☒ Tobacco (5%)
- ☒ Peat-fired power generation

\* Numbers in brackets indicate revenue threshold

## Sustainability communication & reporting

- ☒ Reports on sustainability integration, active ownership and/or screening & restrictions topics

### Basic information

ISIN code  
Website  
Benchmark

LU1668273961  
www.danskeinvest.lu  
40% OMRX Total Market Index, 30% MSCI  
AC World (net dividends reinvested), 20%  
SIX Portfol... [more]

Fund domicile  
Currency  
Manager

Luxembourg  
SEK  
Karl Burck

## Disclaimer & contact information

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Danske Bank Asset Management - a division of Danske Bank A/S  
 Holmens Kanal 2-12  
 DK-1092 Copenhagen, Denmark  
 Company reg. no.: 61 12 62 28  
 Tel. +45 45 13 96 00  
 Fax +45 45 14 98 03  
<https://danskebank.dk/asset-management>