

Responsible investment and our OP4+ process



Responsible investment refers to the incorporation of ESG factors into the selection and management of investments.



Environmental



Social



Governance

The advantages of an open architecture

Thanks to its open architecture, NBI can select portfolio managers with the highest standards in responsible investment.

A rigorous process

The selection and ongoing review of portfolio managers are based on our OP4+ process, where the organization, the people, the process, the performance, and ESG practices are assessed.

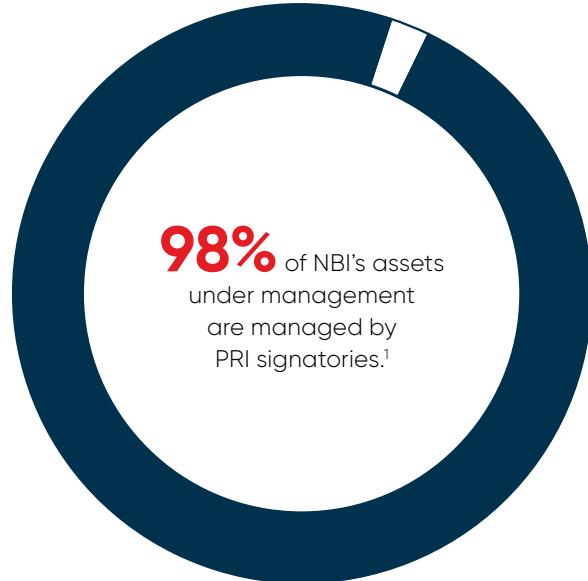
The + pillar

The +, or ESG, pillar assesses the responsible investment practices of portfolio managers based on the 5 other pillars:

- ① **Organization:** corporate culture fostering responsible investment, including governance, strategies, and policies guiding RI.
- ② **People:** ESG expertise within investment teams, supported by dedicated ESG resources.
- ③ **Process:** Investment process that systematically incorporates ESG factors and shareholder engagement.
- ④ **Portfolio:** Consistency between portfolio construction and ESG integration process.
- ⑤ **Performance:** Measurement and management of the portfolio's main ESG risks.

Why integrate ESG factors?

- › To benefit from long-term value creation opportunities.
- › To complement traditional financial analysis.
- › To better manage risks arising from ESG issues.



¹ As of April 30, 2024. Principles for Responsible Investment (PRI) signatories commit to measure and report on their responsible investment activities. Source: National Bank Investments and UN PRI.

Responsible investment and our OP4+ process



Our commitments

Signatory of:



Member of



Open architecture.
Endless opportunities.

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