

SPG – Sustainable Performance Group

Energy
Water
Healthy Living
Resource Efficiency

Four
themes of
the future in
one share



Climate change, shortage of natural resources, shifting demographics and changing consumer habits require innovative and efficient technologies and throw up new investment opportunities. The SPG share combines the growth potential of small and mid cap companies with the investment themes of the future: Energy, Water, Healthy Living and Resource Efficiency.

- Dynamic theme allocation
- Focus on small and medium-sized companies
- Diversification across 40 to 60 holdings
- Private equity investments up to 10%

INVESTMENT STRATEGY

Sustainable Performance Group (SPG) aims to achieve long-term capital growth for its shareholders. In doing so it concentrates on the highly promising themes of Energy, Water, Healthy Living and Resource Efficiency, with a focus on small and medium-sized companies (40 to 60 holdings) which stand out through their innovative products and services. SPG's diversified portfolio is supplemented by private equity, with up to 10% of assets invested in innovative, unlisted companies.

INVESTMENT ADVISOR

SAM (Sustainable Asset Management) acts as investment advisor to SPG. With 13 years of specialized investment expertise, SAM ranks among the globally leading managers of sustainability investments. SAM has a vastly experienced and highly qualified research team and maintains one of the world's biggest sustainability databases. Thanks to its extensive know-how in investment themes of the future, SAM is ideally equipped to translate sustainability trends into attractive investment opportunities. SAM's head office is in Zurich, Switzerland and it also has international branches in Europe, Australia and North America.

BOARD OF DIRECTORS

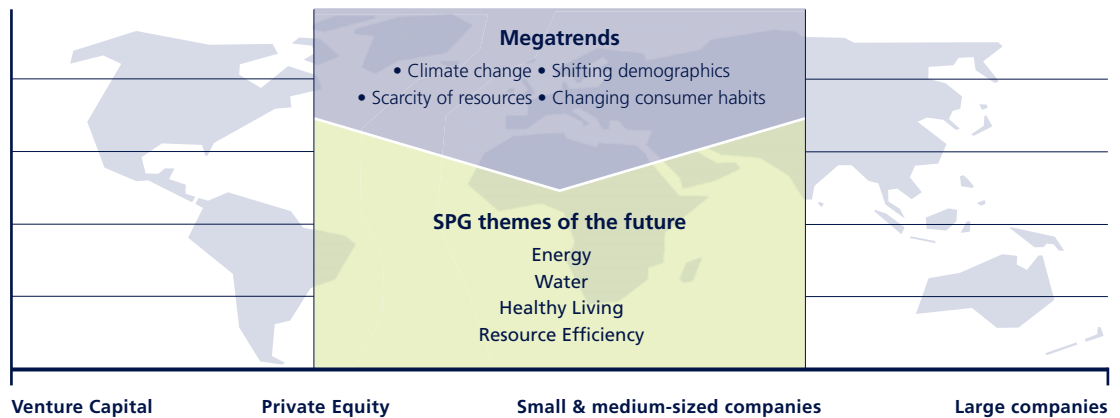
The Board of Directors of Sustainable Performance Group brings together leading personalities from the worlds of business, research and academia, as well as management consulting. Besides its independent control function, the Board of Directors works closely with SAM on a strategic level to develop SPG's investment strategy and monitor its implementation.

Close collaboration between the investment advisor SAM and the SPG Board of Directors ensures a regular review and dynamic adjustment of the investment themes within the portfolio.



Dr. Klaus Woltron, Antoinette Hunziker-Ebneter, Prof. Dr. Ernst A. Brugger, Dr. Doris M. Schönemann, Prof. Dr. Alexander Zehnder

Small and medium-sized companies have very promising technologies in the growth markets researched by SAM. They also offer enormous growth potential thanks to their innovative products and services.



Megatrends present attractive investment opportunities



ENERGY

The energy market is facing radical structural changes in the coming decades. As resources continue to shrink, traditional fossil fuels such as oil, natural gas and coal will increasingly need to be replaced by renewable energies to cope with soaring demand. Wind and solar power still only account for an incredibly small proportion of global electricity production. These two renewable forms of energy therefore have enormous growth potential. At the same time areas of investment such as energy efficiency, security of energy supply and energy distribution are continuing to grow in importance.



HEALTHY LIVING

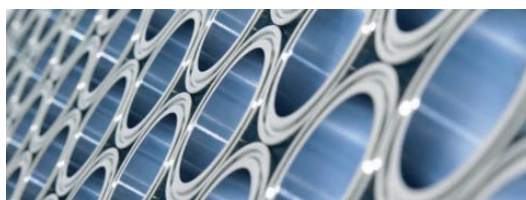
The importance and understanding of good health has increased enormously in recent years. New products, services and technologies are emerging, accelerating the transformation from a niche market into a mass market. Global trends such as shifting demographics, changing consumer habits, increasing chronic diseases and scientific advances set out the overall framework here. Soaring health costs are also boosting demand for a healthy lifestyle. The investment theme Healthy Living combines investment opportunities in healthcare and related markets and presents a symbiosis between nutrition, health, physical activity and well-being.

Implementing the SPG investment strategy requires in-depth knowledge of investment themes, a high degree of specialist expertise and extensive research capacity. The combination of the experienced investment advisor SAM and a Board of Directors with interdisciplinary knowledge lays the foundation for regular sharing of know-how together with continuous monitoring of the investment concept.



WATER

Providing water of adequate quality and in sufficient quantities is becoming one of the key challenges facing modern society. In many countries existing water resources are being overexploited to such an extent that the negative consequences can no longer be ignored. At the same time many people still have no access to clean drinking water. The situation is likely to become even worse in the coming years. Developments will be shaped by megatrends such as exponential population growth, an ageing water infrastructure and climate change. Attractive opportunities exist for all companies involved in the creation and provision of water products and services.



RESOURCE EFFICIENCY

Industrialization and population growth are fuelling demand for raw materials and commodities, whose prices are also rocketing. The enormous demand from newly industrialized countries is also driving this trend, which is set to continue for some time to come. The current use of resources is extremely inefficient and very harmful to the environment. Basic materials, and above all their efficient extraction, industrial use, recycling and disposal, along with new, innovative materials and technologies, throw up attractive investment opportunities. Increasing productivity in the production and use of materials, for example, can significantly reduce the environmental impact.

SPG – The future in one share

FIVE COMPELLING REASONS TO INVEST IN SPG

- Sustainable and innovative technologies in one listed share
- Focus on small and medium-sized companies
- Broadly diversified portfolio
- Experienced investment advisor, close collaboration with hands-on, independent Board of Directors
- Benefits of a listed investment company (autonomy, transparent reporting and voting rights at the general meeting of shareholders)

KEY INFORMATION AT A GLANCE

Who is SPG? Sustainable Performance Group AG (SPG) is a joint-stock company based in Zurich, Switzerland, which focuses on sustainable and innovative technologies.

Where does SPG invest? SPG concentrates on the investment themes of Energy, Water, Healthy Living and Resource Efficiency and focuses on small and medium-sized companies.

How do I become a shareholder? You can buy SPG shares (Swiss securities no. 650216) at your bank on any trading day through SWX Swiss Exchange.

How am I kept informed? As a shareholder you will receive a monthly update on the portfolio: please register for our online newsletter at www.sustainable.ch. The SPG website also provides access to all the company information about SPG.

How high are the fees? The asset management fee comprises a basic fee and a performance-based fee. The basic fee is 1% p.a. The performance-based fee is only paid if the portfolio outperforms the benchmark index MSCI World Ex Financials by at least 2% p.a.

SHAREHOLDER INFORMATION

Reporting	
– Printed publications:	Audited semi-annual and annual report, Quarterly reports
– Online publications:	Monthly reports

Share price	
– Internet:	www.sustainable.ch
– Bloomberg:	SPG SW Equity
– Reuters:	SPG.5

Net Asset Value	
– Internet:	www.sustainable.ch
– Bloomberg:	SPG SW Equity NAV
– Reuters:	SUSTAIN01 (+following pages)

Structure	
– Established:	May 21, 1997
– Domicile:	Zurich, Switzerland
– Listing:	SWX Swiss Exchange, since August 8, 1997
– Swiss security no.:	650216
– ISIN:	CH0006502162

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