



# Social Impact Investing

A shared objective: contributing to the common good

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Confidence  
must be earned

**Amundi**  
ASSET MANAGEMENT



# Social Impact Investing

## A shared objective: contributing to the common good

Amundi accompanies and advises investors in choosing the appropriate investment strategy to reach their impact objectives.

Today, impact investing is organised around investment themes that are aligned with the United Nations' 17 Sustainable Development Goals. These goals involve meeting the basic needs of women and men: having a roof over one's head, finding a job, learning to read and write, feeding and looking after oneself, acquiring independence through entrepreneurship, preserving the environment, limiting water usage, recognising gender equality and participating in building the economy of the future...

Investment with a social impact, better known as social impact investing, combines searching for financial returns with measurable social and/or environmental performance.

## United Nations' Sustainable Development Goals for 2030

### SUSTAINABLE DEVELOPMENT GOALS





## Amundi, a key player in social and environmental impact investing

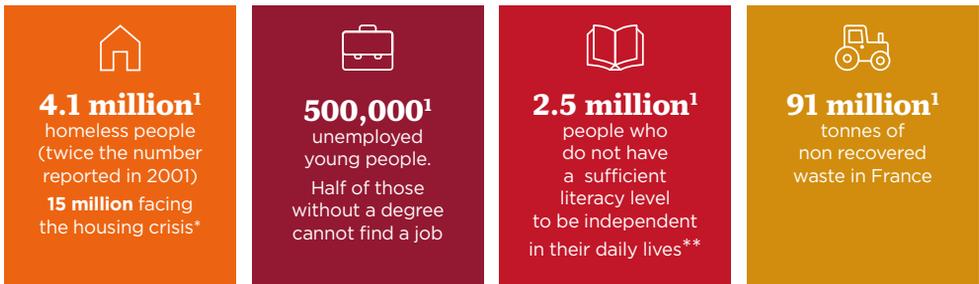
*When Amundi, the leading asset manager in Europe, was created, it made Socially Responsible Investment (SRI) one of its four founding pillars.*

At Amundi, we firmly believe that the positive impacts generated by investing in the social and solidarity-based economy today will be a source of profitability tomorrow. Amundi accompanies and advises investors in choosing the appropriate investment strategy to reach their impact objectives.

For instance, among Amundi’s environment-focused solutions, we have green bond funds, aimed at financing key players of the energy transition, Amundi Transition Énergétique, a joint venture with EDF that invests in renewable energy projects, “low carbon” asset management and thematic funds such as CPR AM’s “Food for Generations” and the KBI Water Fund.

## What if finance came hand in hand with solidarity? Social Investing

A host of basic needs to be addressed in France...



1. Data as of 09/30/21

...a necessary solidarity, manifested through multiple channels, requires increasingly greater resources.

The development of the Social and Solidarity Economy complements the social initiatives implemented at different government levels and the ecosystem constituted by charities, foundations, NGOs, and associations. Today, the challenge is to continue funding social initiatives by promoting the development of profitable social enterprises based on sustainable business models and with activities that can be sustained over a long period of time.

Social impact investing is designed to finance the Social and Solidarity Economy over the long term by creating a direct link between savers and investors looking for meaning in their investments and social enterprises seeking funding. It is a shared objective: **contributing to the common good.**

## A simple formula to better live together every day



Amundi has developed a social investing offering that falls squarely within a booming sector in France and in a few other countries, in particular thanks to a favourable ecosystem and employee savings plans.

Social Impact investing is an additional component to well known solidarity circuits (grants, associations and NGOs). Providing a source of debt or capital financing for long-established, socially-oriented enterprises represents a new opportunity to contribute to a better world and Amundi firmly believes that the social and solidarity-based economy is the source of significant innovation.

By investing or reinvesting nearly €400m in social enterprises, we support their long-term development and leverage the positive impact delivered to the beneficiaries of their activities. The Amundi Finance et Solidarité Fund is symbolic of Amundi's commitment to standing alongside savers and investors who care about both the most vulnerable persons and social enterprises.



The concept of a Social and Solidarity Economy (SSE) denotes a set of organisations with a variety of legal forms (associations, cooperatives, simplified joint stock companies, private limited companies, etc.) whose corporate purpose, activities, revenue and inner workings are primarily focused on social utility and mutual help.

In France, these organisations enjoy a legal framework which has been further strengthened by Law 2014-856 of 31 July 2014 on the Social and Solidarity-Based Economy.

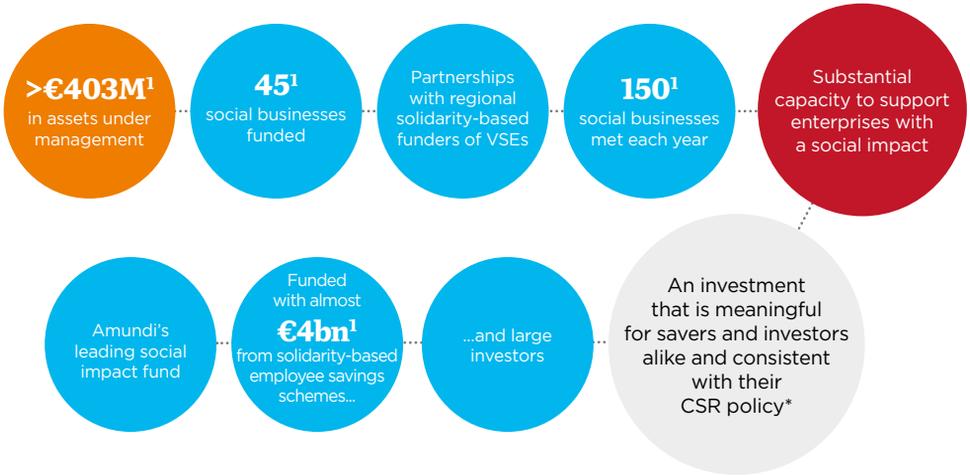
Worldwide, Social Investing is based on investment themes that reference the United Nations' Sustainable Development Goals (SDGs). Their purpose is to contribute to the common good. Impact investing intends to do just that.

\* Source: 26<sup>th</sup> report on the status of substandard housing in France and the Abbé Pierre Foundation.

\*\* Source: INSEE.

## Amundi Finance et Solidarité

The Impact Investing fund managed by Amundi thanks to savers and institutional investors who wish to support social enterprises.



1. Data as of 09/30/21

## Key performance indicators of our social themes provided in simple figures:

- Number of people housed
- Number of jobs created or maintained
- Number of beneficiaries of healthcare services
- Number of people trained
- Number of cases of over-indebtedness prevented
- Number of tonnes of recycled waste
- Number of hectares of farmland preserved
- Number of enterprises created or supported by microfinancing

Today in France,  
tomorrow in Europe and worldwide

\* CSR: Corporate Social Responsibility

# Five Impact Investing Themes

For its Finance et Solidarity Strategy, Amundi has selected five social impact investing themes that cover most of the 17 Sustainable Development Goals (SDGs). The goal of these five themes is to:

Meet the basic needs of women and men by facilitating:



1. Data as of 09/30/21

\*in % of the portfolio investment in the company

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