



## **ASSESSMENT REPORT**

**2021 PILOT**

**AMPERE Gestion**

**Generated 2022-11-21**

## ABOUT THIS REPORT

The assessment report is designed to provide feedback to signatories and support ongoing learning and development. The high-level assessment methodology can be found [here](#) and question-level assessment criteria can be found after each indicator in the Investor Reporting Framework, [here](#). Note that the 2021 scoring methodology has changed to reflect the new Reporting Framework, and is incomparable with scores from previous PRI years.

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A dataset of medians based on all signatories' scores can be referenced [here](#).

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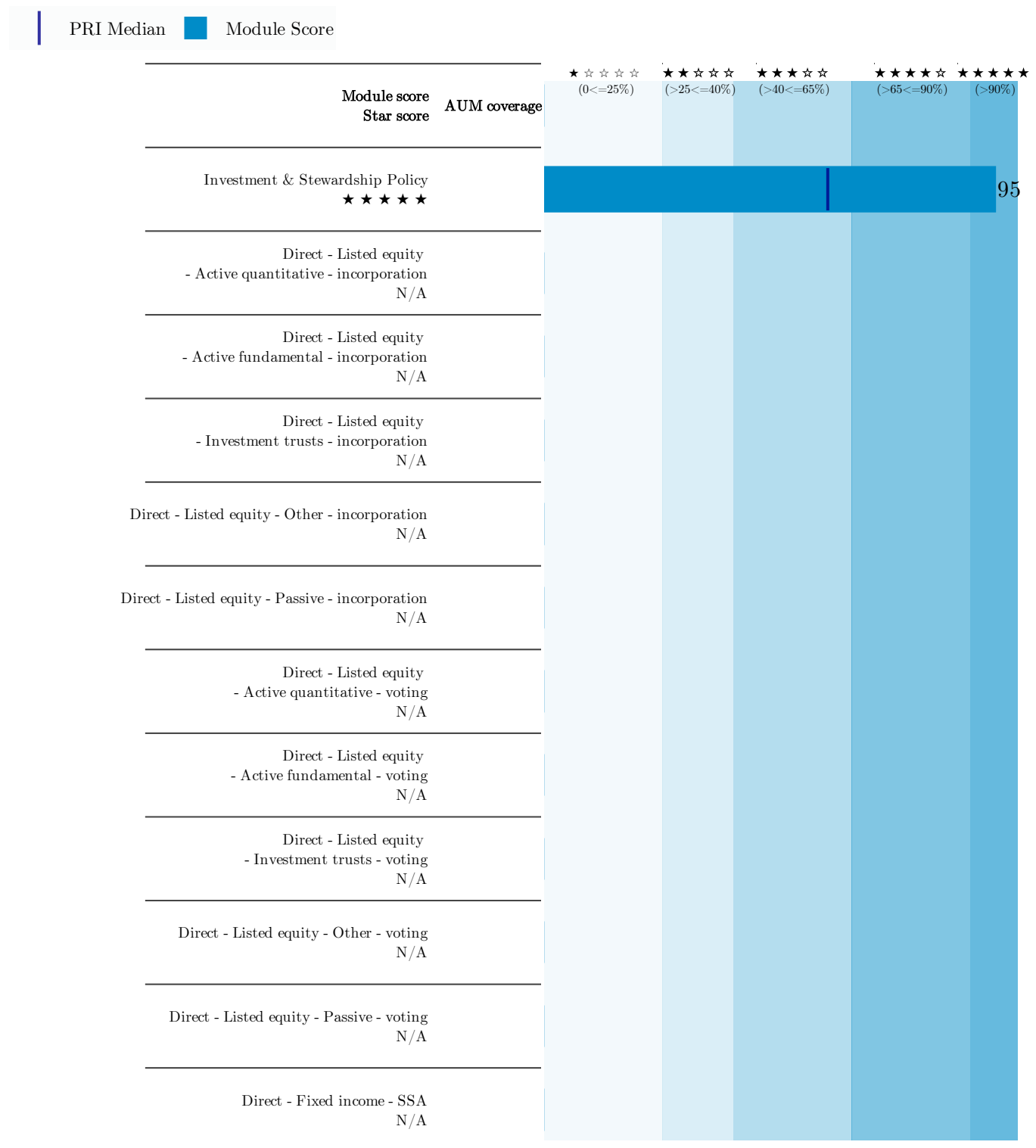
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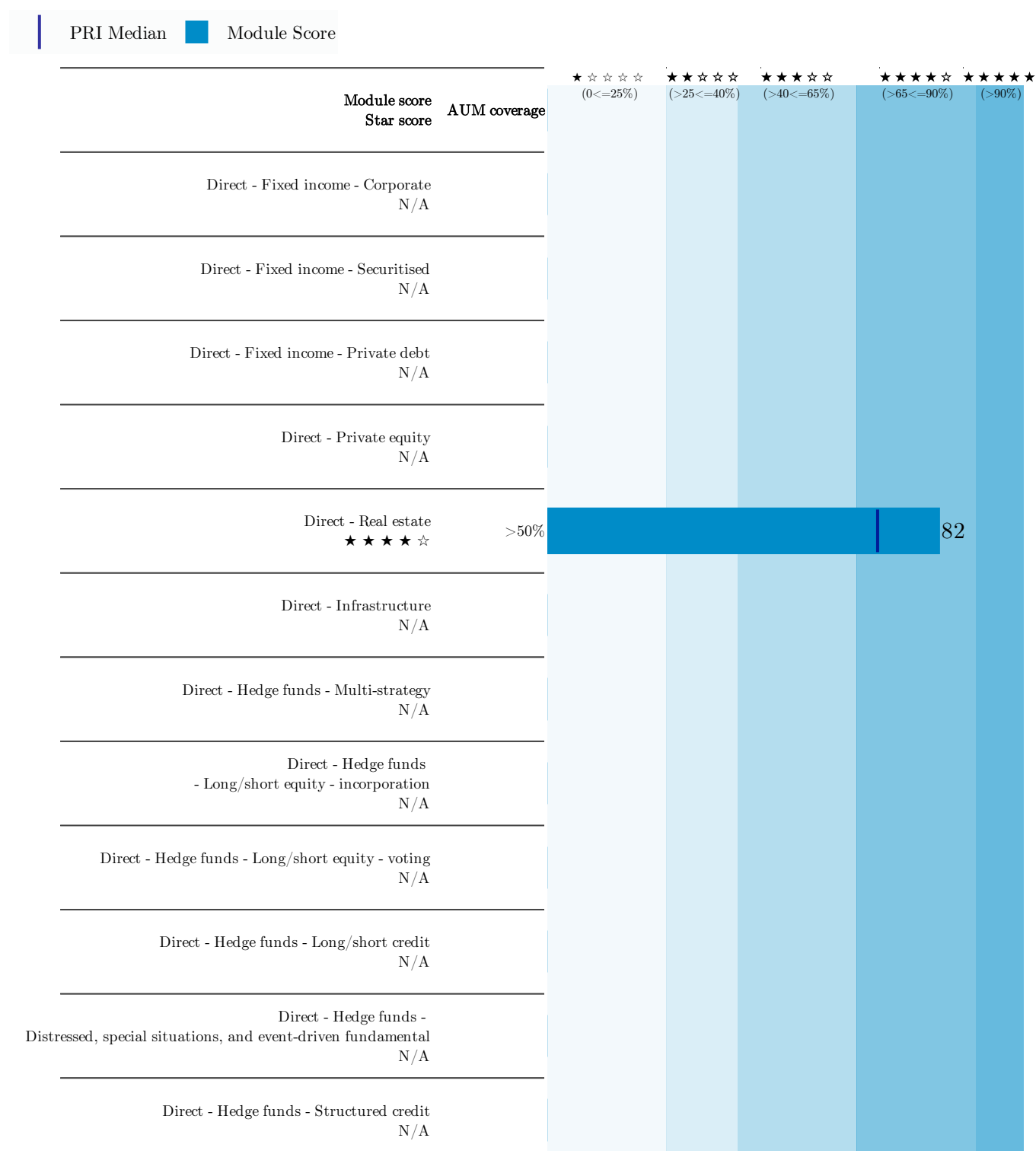
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# Summary Scorecard



## Summary Scorecard (continued)



## Summary Scorecard (continued)

| PRI Median  |  | Module Score |                       |                         |                         |                         |                     |
|---|--|--------------|-----------------------|-------------------------|-------------------------|-------------------------|---------------------|
|   |  |              | ★ ★ ★ ★ ★<br>(0<=25%) | ★ ★ ★ ★ ★<br>(>25<=40%) | ★ ★ ★ ★ ★<br>(>40<=65%) | ★ ★ ★ ★ ★<br>(>65<=90%) | ★ ★ ★ ★ ★<br>(>90%) |
| Module score<br>Star score    AUM coverage              |  |              |                       |                         |                         |                         |                     |
| Direct - Hedge funds - Global macro<br>N/A              |  |              |                       |                         |                         |                         |                     |
| Direct - Hedge funds - Commodity trading advisor<br>N/A |  |              |                       |                         |                         |                         |                     |
| Direct - Hedge funds - Other<br>N/A                     |  |              |                       |                         |                         |                         |                     |
| Indirect - Listed equity - Passive<br>N/A               |  |              |                       |                         |                         |                         |                     |
| Indirect - Listed equity - Active<br>N/A                |  |              |                       |                         |                         |                         |                     |
| Indirect - Fixed income - Passive<br>N/A                |  |              |                       |                         |                         |                         |                     |
| Indirect - Fixed income - Active<br>N/A                 |  |              |                       |                         |                         |                         |                     |
| Indirect - Private equity<br>N/A                        |  |              |                       |                         |                         |                         |                     |
| Indirect - Real estate<br>N/A                           |  |              |                       |                         |                         |                         |                     |
| Indirect - Infrastructure<br>N/A                        |  |              |                       |                         |                         |                         |                     |
| Indirect - Hedge funds<br>N/A                           |  |              |                       |                         |                         |                         |                     |

## Indicator Level Scores For Investment & Stewardship Policy

| Section                                    | Sub-section                       | Topic  | Indicator | Your Score | PRI Median Score | Median Sample Size |
|--|-----------------------------------|--|-----------|------------|------------------|--------------------|
| Responsible investment policy & governance | Responsible investment policy     | Signatories responsible investment policy                                  | ISP 1     | 200/200    | 200/200          | 2791               |
| Responsible investment policy & governance | Responsible investment policy     | Signatories with elements of responsible investment policy                 | ISP 1.1   | 200/200    | 160/200          | 2791               |
| Responsible investment policy & governance | Responsible investment policy     | Signatories with public responsible policy elements                        | ISP 2     | 200/200    | 200/200          | 2791               |
| Responsible investment policy & governance | Responsible investment policy     | Coverage of responsible policy elements                                    | ISP 3     | 200/200    | 200/200          | 2791               |
| Responsible investment policy & governance | Responsible investment policy     | Coverage of asset specific guidelines on ESG incorporation                 | ISP 5     | 150/150    | 150/150          | 1462               |
| Responsible investment policy & governance | Governance                        | Roles with formal oversight and accountability for responsible investment  | ISP 6     | 150/150    | 150/150          | 2791               |
| Responsible investment policy & governance | Governance                        | Roles with implementation responsibilities for responsible investment      | ISP 7     | 100/100    | 100/100          | 2791               |
| Responsible investment policy & governance | People and capabilities           | Staff objectives for responsible investment practices                      | ISP 8     | 150/150    | 150/150          | 2791               |
| Responsible investment policy & governance | People and capabilities           | Bonuses for responsible investment practices                               | ISP 8.2   | 100/100    | 32/100           | 2789               |
| Responsible investment policy & governance | People and capabilities           | Frequency at which staff training for responsible investment is reassessed | ISP 9     | 100/100    | 64/100           | 2791               |
| Responsible investment policy & governance | Strategic asset allocation        | Signatories incorporating ESG factors in strategic asset allocation        | ISP 10.1  | 150/150    | 56/150           | 1755               |
| Stewardship                                | Stewardship policy                | Coverage of stewardship policy   | ISP 11    | 200/200    | 200/200          | 2223               |
| Stewardship                                | Stewardship policy                | Elements of stewardship policy   | ISP 12    | 150/150    | 90/150           | 1987               |
| Stewardship                                | Stewardship policy implementation | Primary mechanism of stewardship policy                                    | ISP 13    | 150/150    | 150/150          | 1987               |

## Indicator Level Scores For Investment & Stewardship Policy (continued)

| Section        | Sub-section                          | Topic   | Indicator | Your Score | PRI Median Score | Median Sample Size |
|----------------|--------------------------------------|---|-----------|------------|------------------|--------------------|
| Stewardship    | Stewardship objectives               | Primary objective of stewardship policy   | ISP 15    | 200/200    | 100/200          | 2223               |
| Stewardship    | Stewardship prioritisation           | Criteria for prioritising engagement targets  | ISP 16    | 100/100    | 100/100          | 2180               |
| Stewardship    | Engaging policymakers                | Signatories who engage with public policy makers  | ISP 23    | 200/200    | 100/200          | 1927               |
| Stewardship    | Engaging policymakers                | Methods used to engage with public policy makers  | ISP 23.1  | 200/200    | 150/200          | 1927               |
| Stewardship    | Engaging policymakers                | Signatories with governance processes to ensure alignment of political activity with stance on responsible investment | ISP 23.2  | 200/200    | 200/200          | 1927               |
| Stewardship    | Engaging policymakers – Policies     | Signatories with policies to ensure alignment of political activity with stance on responsible investment             | ISP 24    | 200/200    | 0/200            | 1927               |
| Stewardship    | Engaging policymakers – Policies     | Public disclosure of political influence policies   | ISP 24.1  | 150/150    | 0/150            | 1927               |
| Stewardship    | Engaging policymakers – Transparency | Disclosure of political influence activities  | ISP 25    | 128/200    | 64/200           | 1744               |
| Climate change | Public support                       | Signatories publicly supporting the Paris Agreement   | ISP 26    | 150/150    | 0/150            | 2791               |
| Climate change | Public support                       | Signatories publicly supporting the TCFD  | ISP 27    | 150/150    | 0/150            | 2791               |
| Climate change | Governance                           | Board oversight for climate-related risks and opportunities [TCFD Governance A]                                       | ISP 28    | 150/200    | 100/200          | 2791               |
| Climate change | Governance                           | Management responsibility for climate-related risks and opportunities [TCFD Governance B]                             | ISP 29    | 200/200    | 100/200          | 2791               |
| Climate change | Strategy                             | Time horizon for climate risks and opportunities [TCFD Strategy A]  | ISP 30.1  | 200/200    | 100/200          | 2791               |
| Climate change | Strategy                             | Climate risks and opportunities identified beyond investment horizon [TCFD Strategy A]                                | ISP 31    | 200/200    | 0/200            | 2791               |

## Indicator Level Scores For Investment & Stewardship Policy (continued)

| Section                                     | Sub-section                                | Topic   | Indicator | Your Score | PRI Median Score | Median Sample Size |
|---|--|---|-----------|------------|------------------|--------------------|
| Climate change                              | Strategy: Scenario analysis                | Use of climate scenario analysis  | ISP 33    | 128/200    | 0/200            | 2791               |
| Sustainability outcomes                     | Set policies on sustainability outcomes    | Location of policy on sustainability outcomes   | ISP 40    | 200/200    | 200/200          | 1206               |
| Sustainability outcomes                     | Set policies on sustainability outcomes    | Frameworks referred to in sustainability outcomes policies and processes              | ISP 41    | 200/200    | 200/200          | 1206               |
| Sustainability outcomes                     | Identify sustainability outcomes           | Tools and frameworks used to identify and map activities onto sustainability outcomes | ISP 44    | 200/200    | 64/200           | 2791               |
| Sustainability outcomes                     | Identify sustainability outcomes           | Levels at which sustainability outcomes are identified and mapped                     | ISP 44.1  | 150/150    | 150/150          | 2790               |
| Sustainability outcomes                     | Identify sustainability outcomes           | Processes for identifying most salient sustainability outcomes                        | ISP 45    | 200/200    | 200/200          | 2791               |
| Transparency & Confidence-Building Measures | Information disclosed – ESG assets         | Information shared regarding ESG products   | ISP 46    | 150/150    | 112/150          | 1592               |
| Transparency & Confidence-Building Measures | Client reporting – ESG assets              | Information included in regular client reporting for ESG products                     | ISP 48    | 150/150    | 112/150          | 1229               |
| Transparency & Confidence-Building Measures | Information disclosed – All assets         | Information shared  | ISP 49    | 150/150    | 150/150          | 2791               |
| Transparency & Confidence-Building Measures | Client reporting – All assets              | ESG information included in regular client reporting                                  | ISP 50    | 200/200    | 100/200          | 2239               |
| Transparency & Confidence-Building Measures | Frequency of client reporting – All assets | Frequency of client reporting of ESG information                                      | ISP 51    | 75/100     | 50/100           | 2058               |
| Transparency & Confidence-Building Measures | Confidence-building measures               | Confidence building measures  | ISP 52    | 200/200    | 128/200          | 2791               |
| Transparency & Confidence-Building Measures | Confidence-building measures               | Internal review: coverage   | ISP 58    | 100/100    | 100/100          | 2392               |
| Transparency & Confidence-Building Measures | Confidence-building measures               | ESG labels held   | ISP 59    | 64/200     | 128/200          | 500                |

## Indicator Level Scores For Direct - Real estate

| Section  | Sub-section               | Topic  | Indicator | Your Score | PRI Median Score | Median Sample Size |
|--|---------------------------|--|-----------|------------|------------------|--------------------|
| Policy   | Investment guidelines     | Real estate specific elements of responsible investment policy | RE 1      | 200/200    | 200/200          | 422                |
| Fundraising  | Commitments to investors  | Formal responsible investment commitments made                 | RE 2      | 150/150    | 48/150           | 309                |
| Pre-investment phase   | Materiality analysis      | Level at which materiality is assessed                         | RE 3      | 200/200    | 200/200          | 422                |
| Pre-investment phase   | Materiality analysis      | Tools used in materiality analysis                             | RE 3.1    | 96/150     | 48/150           | 422                |
| Pre-investment phase   | Due diligence             | Effect of ESG on selection of real estate investments          | RE 4      | 200/200    | 163/200          | 422                |
| Pre-investment phase   | Due diligence             | Processes used to conduct ESG due diligence                    | RE 5      | 200/200    | 190/200          | 422                |
| Selection, appointment and monitoring of third-party property managers | Selection process         | ESG factors in selection of third party property managers      | RE 6      | 0/200      | 128/200          | 291                |
| Selection, appointment and monitoring of third-party property managers | Appointment process       | ESG factors in appointment of third party property managers    | RE 7      | 138/150    | 98/150           | 291                |
| Selection, appointment and monitoring of third-party property managers | Monitoring process        | ESG factors in monitoring of third party property managers     | RE 8      | 200/200    | 150/200          | 291                |
| Post-investment phase  | Monitoring                | Operational ESG data collected                                 | RE 11     | 114/200    | 142/200          | 422                |
| Post-investment phase  | Monitoring                | Target setting for core ESG KPIs                               | RE 12     | 200/200    | 200/200          | 422                |
| Post-investment phase  | Monitoring                | Processes that support investees in meeting ESG targets        | RE 13     | 150/150    | 112/150          | 422                |
| Post-investment phase  | Monitoring                | Management of post-investment ESG risks and opportunities      | RE 14     | 175/200    | 142/200          | 422                |
| Post-investment phase  | Monitoring                | Percentage of real estate assets with external certification   | RE 16     | 64/100     | 32/100           | 422                |
| Post-investment phase  | Stewardship               | Engagement with tenants  | RE 17     | 150/150    | 94/150           | 422                |
| Post-investment phase  | Exit                      | Responsible investment information shared with buyers at exit  | RE 18     | 100/100    | 65/100           | 422                |
| Reporting/Disclosure   | ESG portfolio information | Methods for reporting core ESG metrics and targets             | RE 19     | 48/150     | 48/150           | 422                |