



Discretionary		Gateway
Reason for Interaction		<input checked="" type="checkbox"/> To support investment decisionmaking in & company's material ESG issues <input checked="" type="checkbox"/> To encourage corporate transition or identify the need to transition on ESG issues <input checked="" type="checkbox"/> To engage investor ESG disclosure <input type="checkbox"/> Other: specify _____ <input type="checkbox"/> We do not engage via internal staff
Type of engagement	Individual/ internal staff engagements	<input type="checkbox"/> To support investment decisionmaking in & company's material ESG issues <input type="checkbox"/> To encourage corporate transition or identify the need to transition on ESG issues <input type="checkbox"/> Other: specify _____ <input type="checkbox"/> We do not engage via collaborative engagements
	Collaborative engagements	<input type="checkbox"/> To support investment decisionmaking in & company's material ESG issues <input type="checkbox"/> To encourage corporate transition or identify the need to transition on ESG issues <input type="checkbox"/> Other: specify _____ <input type="checkbox"/> We do not engage via collaborative engagements
	Service provider engagements	<input type="checkbox"/> To support investment decisionmaking in & company's material ESG issues <input type="checkbox"/> To encourage corporate transition or identify the need to transition on ESG issues <input type="checkbox"/> Other: specify _____ <input type="checkbox"/> We do not engage via service providers

RI TRANSPARENCY REPORT

2020

Regime de Rentes du Mouvement Desjardins

About this report

The PRI Reporting Framework is a key step in the journey towards building a common language and industry standard for reporting responsible investment (RI) activities. This RI Transparency Report is one of the key outputs of this Framework. Its primary objective is to enable signatory transparency on RI activities and facilitate dialogue between investors and their clients, beneficiaries and other stakeholders. A copy of this report will be publicly disclosed for all reporting signatories on the [PRI website](#), ensuring accountability of the PRI Initiative and its signatories.

This report is an export of the individual Signatory organisation's response to the PRI during the reporting period specified above. It includes their responses to mandatory indicators, as well as responses to voluntary indicators the signatory has agreed to make public. The information is presented exactly as it was reported. Where an indicator offers a response option that is multiple-choice, all options that were available to the signatory to select are presented in this report. Presenting the information exactly as reported is a result of signatory feedback which suggested the PRI not summarise the information.

PRI disclaimer

This document presents information reported directly by signatories. This information has not been audited by the PRI Secretariat or any other party acting on their behalf. While this information is believed to be reliable, no representations or warranties are made as to the accuracy of the information presented, and no responsibility or liability can be accepted for any error or omission.

Usage restrictions

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OO 01	Mandatory	Gateway/Peering	General
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OO 01.1 Select the type that best describes your organisation or the services you provide.

- Non-corporate pension or superannuation or retirement or provident fund or plan
- Corporate pension or superannuation or retirement or provident fund or plan
- Insurance company
- Foundation
- Endowment
- Development finance institution
- Reserve - sovereign or government controlled fund
- Family office
- Other, specify

OO 02	Mandatory	Peering	General
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OO 02.1 Select the location of your organisation's headquarters.

Canada

OO 02.2 Indicate the number of countries in which you have offices (including your headquarters).

- 1
- 2-5
- 6-10
- >10

OO 02.3 Indicate the approximate number of staff in your organisation in full-time equivalents (FTE).

52

OO 03	Mandatory	Descriptive	General
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OO 03.1 Indicate whether you have subsidiaries within your organisation that are also PRI signatories in their own right.

- Yes
- No

OO 04	Mandatory	Gateway/Peering	General
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OO 04.1 Indicate the year end date for your reporting year.

31/12/2019

OO 04.2 Indicate your total AUM at the end of your reporting year.

Total AUM

15,122,957,800 CAD

11373151805 USD

OO 05	Mandatory to Report, Voluntary to Disclose	Gateway	General
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OO 05.1 Provide an approximate percentage breakdown of your AUM at the end of your reporting year using the following asset classes and investment strategies:

	Internally managed (%)	Externally managed (%)
Listed equity	0	25.9
Fixed income	0	42.2
Private equity	0	4.7
Property	0	11
Infrastructure	0	11.2
Commodities	0	0
Hedge funds	0	0
Fund of hedge funds	0	0
Forestry	0	0

Farmland	0	0
Inclusive finance	0	0
Cash	0	0.3
Money market instruments	0	0
Other (1), specify	0	4.7
Other (2), specify	0	0

Externally managed "Other (1)" description

The asset class "Specialty Finance Securities" includes participations in asset-related debt instruments, as well as participations in Funds with this objective.

OO 06	Mandatory	Descriptive	General
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OO 06.1 Select how you would like to disclose your asset class mix.

- as percentage breakdown
- as broad ranges

OO 06.3 Indicate whether your organisation has any off-balance sheet assets [Optional].

- Yes
- No

OO 06.5 Indicate whether your organisation uses fiduciary managers.

- Yes, we use a fiduciary manager and our response to OO 5.1 is reflective of their management of our assets.
- No, we do not use fiduciary managers.

OO 07	Mandatory to Report, Voluntary to Disclose	Gateway	General
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Private

OO 08	Mandatory to Report, Voluntary to Disclose	Peering	General
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Private

OO 09	Mandatory	Peering	General
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OO 09.1 Indicate the breakdown of your organisation's AUM by market.



OO 10	Mandatory	Gateway	General
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OO 10.1 Select the active ownership activities your organisation implemented in the reporting year.

Listed equity – engagement

- We engage with companies on ESG factors via our staff, collaborations or service providers.
- We require our external managers to engage with companies on ESG factors on our behalf.
- We do not engage directly and do not require external managers to engage with companies on ESG factors.

Listed equity – voting

- We cast our (proxy) votes directly or via dedicated voting providers
- We require our external managers to vote on our behalf.
- We do not cast our (proxy) votes directly and do not require external managers to vote on our behalf

Fixed income SSA – engagement

- We engage with SSA bond issuers on ESG factors via our staff, collaborations or service providers.
- We require our external managers to engage with SSA bond issuers on ESG factors on our behalf.
- We do not engage directly and do not require external managers to engage with SSA bond issuers on ESG factors. Please explain why you do not.

Fixed income Corporate (financial) – engagement
<input type="checkbox"/> We engage with companies on ESG factors via our staff, collaborations or service providers. <input checked="" type="checkbox"/> We require our external managers to engage with companies on ESG factors on our behalf. <input type="checkbox"/> We do not engage directly and do not require external managers to engage with companies on ESG factors. Please explain why you do not.
Fixed income Corporate (non-financial) – engagement
<input type="checkbox"/> We engage with companies on ESG factors via our staff, collaborations or service providers. <input checked="" type="checkbox"/> We require our external managers to engage with companies on ESG factors on our behalf. <input type="checkbox"/> We do not engage directly and do not require external managers to engage with companies on ESG factors. Please explain why you do not.

OO 11	Mandatory	Gateway	General
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OO 11.2 Select the externally managed assets classes in which you and/or your investment consultants address ESG incorporation in your external manager selection, appointment and/or monitoring processes.

Asset class	ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes		
Listed equity	<table border="1"> <tr> <td style="background-color: #0070C0; color: white; text-align: center;">Listed equity - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes</td> </tr> <tr> <td> <input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation </td> </tr> </table>	Listed equity - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes	<input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation
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Fixed income - SSA	<table border="1"> <tr> <td style="background-color: #0070C0; color: white; text-align: center;">Fixed income - SSA - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes</td> </tr> <tr> <td> <input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation </td> </tr> </table>	Fixed income - SSA - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes	<input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation
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Private equity	<table border="1"> <tr> <td style="background-color: #0070C0; color: white; text-align: center;">Private equity - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes</td> </tr> <tr> <td> <input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation </td> </tr> </table>	Private equity - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes	<input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation
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Infrastructure	<p>Infrastructure - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes</p> <input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation
Cash	<p>Cash - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes</p> <input type="checkbox"/> We incorporate ESG into our external manager selection process <input type="checkbox"/> We incorporate ESG into our external manager appointment process <input type="checkbox"/> We incorporate ESG into our external manager monitoring process <input checked="" type="checkbox"/> We do not do ESG incorporation
Other (1)	<p>Other (1) - ESG incorporation addressed in your external manager selection, appointment and/or monitoring processes</p> <input checked="" type="checkbox"/> We incorporate ESG into our external manager selection process <input checked="" type="checkbox"/> We incorporate ESG into our external manager appointment process <input checked="" type="checkbox"/> We incorporate ESG into our external manager monitoring process <input type="checkbox"/> We do not do ESG incorporation

OO 11.3b If your organisation does not integrate ESG factors into investment decisions on your externally managed assets, explain why not.

Cash : There is a lot of turnover in the portfolio depending of the capital call/distribution received throughout the year, which translates in a lot of transactions. It would be impossible to track or follow ESG factors in the portfolio due to the high turnover of the assets and a large portion are SSA assets.

OO 11.4 Provide a brief description of how your organisation includes responsible investment considerations in your investment manager selection, appointment and monitoring processes.

Like in 2018, there is an ESG section in our investment due diligence and it is integrated to the presentation document submitted to the investment committee. We give an appreciation on each of the elements (ESG) with comments to support our appreciation. We also include a discussion with the manager to better understand how ESG is integrated to the different steps of the investment process and how it can influence their decisions. During the life of an investment, we follow quarterly any incident or improvement declared by the managers. Also, we monitor the percentage invested in clean energy and in non-clean energy of the total portfolio. Finally, we do not hesitate to question a manager on ESG considerations, by example, if we consider that a voting process is not appropriate or an investment is, to our point of view, not in the scope of the mandate, etc.

In 2019, the updated due diligence and monitoring questionnaires were developed. We also proceeded to send the initial due diligence questionnaire to all our managers. The monitoring questionnaire will be sent annually from now on.

OO 12 Mandatory Gateway General

OO 12.1 Below are all applicable modules or sections you may report on. Those which are mandatory to report (asset classes representing 10% or more of your AUM) are already ticked and read-only. Those which are voluntary to report on can be opted into by ticking the box.

Core modules
<input checked="" type="checkbox"/> Organisational Overview <input checked="" type="checkbox"/> Strategy and Governance
RI implementation directly or via service providers
<p>Direct - Listed Equity active ownership</p> <input checked="" type="checkbox"/> (Proxy) voting
RI implementation via external managers
<p>Indirect - Selection, Appointment and Monitoring of External Managers</p> <input checked="" type="checkbox"/> Listed Equities <input checked="" type="checkbox"/> Fixed income - SSA <input checked="" type="checkbox"/> Fixed income - Corporate (financial) <input checked="" type="checkbox"/> Fixed income - Corporate (non-financial) <input checked="" type="checkbox"/> Private Equity <input checked="" type="checkbox"/> Property <input checked="" type="checkbox"/> Infrastructure
Closing module
<input checked="" type="checkbox"/> Closing module

OO SAM 01 Mandatory to Report, Voluntary to Disclose Gateway General

Private

If there are any messages below, please review them before continuing. If there are no messages below, please save this page and continue.

SG 01	Mandatory	Core Assessed	General													
SG 01.1	Indicate if you have an investment policy that covers your responsible investment approach.															
<input checked="" type="checkbox"/> Yes																
SG 01.2	Indicate the components/types and coverage of your policy.															
<table border="1"> <thead> <tr> <th>Policy components/types</th> <th>Coverage by AUM</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Policy setting out your overall approach</td> <td rowspan="10"> <input checked="" type="checkbox"/> Applicable policies cover all AUM <input type="checkbox"/> Applicable policies cover a majority of AUM <input type="checkbox"/> Applicable policies cover a minority of AUM </td> </tr> <tr> <td><input checked="" type="checkbox"/> Formalised guidelines on environmental factors</td> </tr> <tr> <td><input type="checkbox"/> Formalised guidelines on social factors</td> </tr> <tr> <td><input checked="" type="checkbox"/> Formalised guidelines on corporate governance factors</td> </tr> <tr> <td><input checked="" type="checkbox"/> Fiduciary (or equivalent) duties</td> </tr> <tr> <td><input checked="" type="checkbox"/> Asset class-specific RI guidelines</td> </tr> <tr> <td><input type="checkbox"/> Sector specific RI guidelines</td> </tr> <tr> <td><input checked="" type="checkbox"/> Screening / exclusions policy</td> </tr> <tr> <td><input type="checkbox"/> Other, specify (1)</td> </tr> <tr> <td><input type="checkbox"/> Other, specify(2)</td> </tr> </tbody> </table>		Policy components/types	Coverage by AUM	<input checked="" type="checkbox"/> Policy setting out your overall approach	<input checked="" type="checkbox"/> Applicable policies cover all AUM <input type="checkbox"/> Applicable policies cover a majority of AUM <input type="checkbox"/> Applicable policies cover a minority of AUM	<input checked="" type="checkbox"/> Formalised guidelines on environmental factors	<input type="checkbox"/> Formalised guidelines on social factors	<input checked="" type="checkbox"/> Formalised guidelines on corporate governance factors	<input checked="" type="checkbox"/> Fiduciary (or equivalent) duties	<input checked="" type="checkbox"/> Asset class-specific RI guidelines	<input type="checkbox"/> Sector specific RI guidelines	<input checked="" type="checkbox"/> Screening / exclusions policy	<input type="checkbox"/> Other, specify (1)	<input type="checkbox"/> Other, specify(2)		
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<input checked="" type="checkbox"/> Screening / exclusions policy																
<input type="checkbox"/> Other, specify (1)																
<input type="checkbox"/> Other, specify(2)																
SG 01.3	Indicate if the investment policy covers any of the following															
<input checked="" type="checkbox"/> Your organisation's definition of ESG and/or responsible investment and it's relation to investments <input type="checkbox"/> Your investment objectives that take ESG factors/real economy influence into account <input checked="" type="checkbox"/> Time horizon of your investment <input checked="" type="checkbox"/> Governance structure of organisational ESG responsibilities <input checked="" type="checkbox"/> ESG incorporation approaches <input checked="" type="checkbox"/> Active ownership approaches <input checked="" type="checkbox"/> Reporting <input checked="" type="checkbox"/> Climate change <input type="checkbox"/> Understanding and incorporating client / beneficiary sustainability preferences <input type="checkbox"/> Other RI considerations, specify (1) <input type="checkbox"/> Other RI considerations, specify (2)																
SG 01.4	Describe your organisation's investment principles and overall investment strategy, interpretation of fiduciary (or equivalent) duties, and how they consider ESG factors and real economy impact.															
<p>The objective of the RRMD's investment policy is to secure the benefits prudently and effectively and to ensure that there will be sufficient assets to enable benefits to be paid as they fall due. Therefore, the objective is to obtain optimal return for the fund, while maintaining an appropriate level of risk, including ESG risk criteria, especially with respect to the volatility of contributions. Assets are divided into two portfolios: a matching portfolio that minimizes the variation in the gap between the RRMD assets and liabilities, and a performance portfolio that aims to generate sufficient returns to pay member pensions.</p> <p>To generate stability and promote growth in the decades to come, the RRMD considers it is important to foster sustainable development. To that end, the RRMD promotes responsible investment which allows the plan, along with the Desjardins Group, to play a proactive role in regards to challenges in environmental, social and governance matters. The RRMD is primarily a manager of managers. In the due diligence process, which helps selected a manager, a section is devoted to the evaluation of the approach taken to implement ESG factors.</p>																
SG 01.5	Provide a brief description of the key elements, any variations or exceptions to your investment policy that covers your responsible investment approach. [Optional]															
<p>Certain key elements covered in our investment principles target specific considerations in our responsible investment approach such as:</p> <p>Prioritize renewable energies projects in direct infrastructure investments.</p> <p>By the end of 2020, objective that the carbon footprint of all of its portfolios invested in corporate bonds in active management mandates and in public equities to be is less than 20% to that of the companies that make up the benchmarks specific to these mandates.</p> <p>The most recent version of our policy was adopted by our internal investment management committee (Comité de gestion des placements) on March 4 2019. This policy will be reviewed by this committee at least every 3 years (maximum upon March 4 2022). The Policy was updated as of March 16 2020 to add specific exclusions for tobacco product and vaping and vaping products in most sector.</p>																
<input type="checkbox"/> No																

SG 01 CC	Mandatory to Report, Voluntary to Disclose	Descriptive	General
Private			

SG 02	Mandatory	Core Assessed	PRI 6
SG 02.1	Indicate which of your investment policy documents (if any) are publicly available. Provide a URL and an attachment of the document.		
<input type="checkbox"/> Policy setting out your overall approach <input type="checkbox"/> Formalised guidelines on environmental factors <input type="checkbox"/> Formalised guidelines on corporate governance factors <input type="checkbox"/> Fiduciary (or equivalent) duties			

- Asset class-specific RI guidelines
- Screening / exclusions policy
- (Proxy) voting policy
- We do not publicly disclose our investment policy documents

SG 02.2 Indicate if any of your investment policy components are publicly available. Provide URL and an attachment of the document.

- Your organisation's definition of ESG and/or responsible investment and it's relation to investments
- Time horizon of your investment
- Governance structure of organisational ESG responsibilities
- ESG incorporation approaches

URL/Attachment

- URL
https://www.rcd-dgp.com/fr/votre_regime/investissement_responsable
- Attachment

- Active ownership approaches

URL/Attachment

- URL
https://www.rcd-dgp.com/fr/votre_regime/investissement_responsable
- Attachment

- Reporting
- Climate change

URL/Attachment

- URL
https://www.rcd-dgp.com/fr/votre_regime/investissement_responsable
- Attachment

- We do not publicly disclose any investment policy components

SG 02.3 Additional information [Optional].

The RRMD does not publicly disclose its investment policy documents, but one page on its website summarizes its approach to responsible investing (https://www.rcd-dgp.com/en/your_pension_plan/responsible_investing). The RRMD expects to increase its responsible investment disclosure over time.

SG 03 **Mandatory** **Core Assessed** **General**

SG 03.1 Indicate if your organisation has a policy on managing potential conflicts of interest in the investment process.

- Yes

SG 03.2 Describe your policy on managing potential conflicts of interest in the investment process.

The Desjardins Group Retirement Committee (DGRC) adopted a code of conduct that applies to its members and investment committee. They must confirm their commitment to upholding the code or codes that apply to them every year. The DGRC ensures that the register of the interests and rights of those required to do so is maintained and updated accordingly.

The code of conduct includes a section on the management of conflicts of interest. DGRC members are required to disclose any potential conflict of interest so that the appropriate measures are taken to ensure management of the conflict in the real interest of the plan's members and beneficiaries. The measures can range from imposing limitations on the member's or employee's interventions, participation in discussion and decision-making, to asking the member or employee to abstain from discussion and decision-making. Also, the code of conduct addresses the concerns around gifts and gratuities.

- No

SG 04 **Voluntary** **Descriptive** **General**

Private

SG 05 **Mandatory** **Gateway/Core Assessed** **General**

SG 05.1 Indicate if and how frequently your organisation sets and reviews objectives for its responsible investment activities.

- Quarterly or more frequently
- Biannually
- Annually
- Less frequently than annually
- Ad-hoc basis
- It is not set/reviewed

SG 05.2 Additional information. [Optional]

The Desjardins Group Pension Plan Division employees set and review objectives for its responsible investment activities annually. The Desjardins Group Retirement Committee's investment committee reviews the responsible investment policy at least once every three years. Policies are reviewed on an ongoing basis and at least once a year thoroughly.

SG 06	Voluntary	Descriptive	General																		
Private																					
SG 07	Mandatory	Core Assessed	General																		
SG 07.1	Indicate the internal and/or external roles used by your organisation, and indicate for each whether they have oversight and/or implementation responsibilities for responsible investment.																				
Roles																					
<input checked="" type="checkbox"/> Board members or trustees <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Oversight/accountability for responsible investment <input type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment <input checked="" type="checkbox"/> Internal Roles (triggers other options) <table border="1" style="width: 100%; margin-top: 10px;"> <tr> <td colspan="2">Select from the below internal roles</td> </tr> <tr> <td><input checked="" type="checkbox"/> Chief Executive Officer (CEO), Chief Investment Officer (CIO), Chief Operating Officer (COO), Investment Committee</td> <td> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Oversight/accountability for responsible investment <input type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment </td> </tr> <tr> <td><input checked="" type="checkbox"/> Other Chief-level staff or head of department, specify Director, Legal Affairs and Governance</td> <td> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Oversight/accountability for responsible investment <input type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment </td> </tr> <tr> <td><input checked="" type="checkbox"/> Portfolio managers</td> <td> <ul style="list-style-type: none"> <input type="checkbox"/> Oversight/accountability for responsible investment <input checked="" type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment </td> </tr> <tr> <td><input checked="" type="checkbox"/> Investment analysts</td> <td> <ul style="list-style-type: none"> <input type="checkbox"/> Oversight/accountability for responsible investment <input checked="" type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment </td> </tr> <tr> <td><input type="checkbox"/> Dedicated responsible investment staff</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Investor relations</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Other role, specify (1)</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Other role, specify (2)</td> <td></td> </tr> </table> <input checked="" type="checkbox"/> External managers or service providers <ul style="list-style-type: none"> <input type="checkbox"/> Oversight/accountability for responsible investment <input checked="" type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment 				Select from the below internal roles		<input checked="" type="checkbox"/> Chief Executive Officer (CEO), Chief Investment Officer (CIO), Chief Operating Officer (COO), Investment Committee	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Oversight/accountability for responsible investment <input type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment 	<input checked="" type="checkbox"/> Other Chief-level staff or head of department, specify Director, Legal Affairs and Governance	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Oversight/accountability for responsible investment <input type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment 	<input checked="" type="checkbox"/> Portfolio managers	<ul style="list-style-type: none"> <input type="checkbox"/> Oversight/accountability for responsible investment <input checked="" type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment 	<input checked="" type="checkbox"/> Investment analysts	<ul style="list-style-type: none"> <input type="checkbox"/> Oversight/accountability for responsible investment <input checked="" type="checkbox"/> Implementation of responsible investment <input type="checkbox"/> No oversight/accountability or implementation responsibility for responsible investment 	<input type="checkbox"/> Dedicated responsible investment staff		<input type="checkbox"/> Investor relations		<input type="checkbox"/> Other role, specify (1)		<input type="checkbox"/> Other role, specify (2)	
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<input type="checkbox"/> Dedicated responsible investment staff																					
<input type="checkbox"/> Investor relations																					
<input type="checkbox"/> Other role, specify (1)																					
<input type="checkbox"/> Other role, specify (2)																					
SG 07.3	Indicate the number of dedicated responsible investment staff your organisation has.																				
0																					
SG 07.4	Additional information. [Optional]																				
<p>The RRMD does not have dedicated responsible investment staff, but it works closely with dedicated responsible investment staff of other branches of Desjardins Group.</p> <p>As mentioned, an external provider (ISS) has been hired to ensure that RRMD's voting rights policy is strictly enforced.</p> <p>Employees in the organization have been identified to sit on ESG Committee of the Desjardins Group and within the Régime de rentes du Mouvement Desjardins, members of the organization are designated to take part of an ESG working group.</p> <p>Also, Analysts, Portfolio Manager and Legal Director are all involved in monitoring the best practices and staying informed of trends and benchmarks.</p> <p>The potential hire of a dedicated resource is actually under study by the RRMD.</p>																					
SG 07 CC	Mandatory to Report, Voluntary to Disclose	Descriptive	General																		
Private																					

SG 08	Voluntary	Additional Assessed	General
Private			
SG 09	Mandatory	Core Assessed	PRI 4,5
SG 09.1	Select the collaborative organisation and/or initiatives of which your organisation is a member or in which it participated during the reporting year, and the role you played.		
<input checked="" type="checkbox"/> Principles for Responsible Investment			
Basic		Your organisation's role in the initiative during the reporting period (see definitions)	
		Provide a brief commentary on the level of your organisation's involvement in the initiative. [Optional]	
<p>The RRMD became a signatory of the PRI in January 2018. The organization has submitted its first assessment report for the year 2018, and 2019 is the first year to complete the mandatory reporting. We attended the Montreal meeting in April 2019 and had 2 people from our organization attend the annual International conference in Paris in 2019.</p>			
<input type="checkbox"/> Asian Corporate Governance Association <input type="checkbox"/> Australian Council of Superannuation Investors <input type="checkbox"/> AVCA: Sustainability Committee <input type="checkbox"/> France Invest – La Commission ESG <input type="checkbox"/> BVCA – Responsible Investment Advisory Board <input type="checkbox"/> CDP Climate Change <input type="checkbox"/> CDP Forests <input type="checkbox"/> CDP Water <input type="checkbox"/> CFA Institute Centre for Financial Market Integrity <input type="checkbox"/> Climate Action 100+ <input type="checkbox"/> Code for Responsible Investment in SA (CRISA) <input type="checkbox"/> Council of Institutional Investors (CII) <input type="checkbox"/> Eumedion <input type="checkbox"/> Extractive Industries Transparency Initiative (EITI) <input type="checkbox"/> ESG Research Australia <input type="checkbox"/> Invest Europe Responsible Investment Roundtable <input type="checkbox"/> Global Investors Governance Network (GIGN) <input type="checkbox"/> Global Impact Investing Network (GIIN) <input type="checkbox"/> Global Real Estate Sustainability Benchmark (GRESB) <input type="checkbox"/> Green Bond Principles <input type="checkbox"/> HKVCA: ESG Committee <input type="checkbox"/> Institutional Investors Group on Climate Change (IIGCC) <input type="checkbox"/> Interfaith Center on Corporate Responsibility (ICCR) <input type="checkbox"/> International Corporate Governance Network (ICGN) <input type="checkbox"/> Investor Group on Climate Change, Australia/New Zealand (IGCC) <input type="checkbox"/> International Integrated Reporting Council (IIRC) <input type="checkbox"/> Investor Network on Climate Risk (INCR)/CERES <input type="checkbox"/> Local Authority Pension Fund Forum <input type="checkbox"/> Principles for Financial Action in the 21st Century <input type="checkbox"/> Principles for Sustainable Insurance <input type="checkbox"/> Regional or National Social Investment Forums (e.g. UKSIF, Eurosif, ASRIA, RIAA), specify <input type="checkbox"/> Responsible Finance Principles in Inclusive Finance <input type="checkbox"/> Shareholder Association for Research and Education (Share) <input type="checkbox"/> United Nations Environmental Program Finance Initiative (UNEP FI) <input type="checkbox"/> United Nations Global Compact <input type="checkbox"/> Other collaborative organisation/initiative, specify <input type="checkbox"/> Other collaborative organisation/initiative, specify <input type="checkbox"/> Other collaborative organisation/initiative, specify <input type="checkbox"/> Other collaborative organisation/initiative, specify			
SG 09.2	Mandatory to Report, Voluntary to Disclose	Descriptive	PRI 1
Private			
SG 10	Mandatory	Core Assessed	PRI 4
SG 10.1	Indicate if your organisation promotes responsible investment, independently of collaborative initiatives.		

✓ Yes

SG 10.2 Indicate the actions your organisation has taken to promote responsible investment independently of collaborative initiatives. Provide a description of your role in contributing to the objectives of the selected action and the typical frequency of your participation/contribution.

- Provided or supported education or training programmes (this includes peer to peer RI support) Your education or training may be for clients, investment managers, actuaries, broker/dealers, investment consultants, legal advisers etc.)
- Provided financial support for academic or industry research on responsible investment
- Provided input and/or collaborated with academia on RI related work

Description

Participated in a meeting, interview for a research conducted by a student completing its Master degree in Social and Environmental Responsibility in November 2019.

Frequency of contribution

- Quarterly or more frequently
- Biannually
- Annually
- Less frequently than annually
- Ad hoc
- Other

- Encouraged better transparency and disclosure of responsible investment practices across the investment industry

Description

Since the RRMD is primarily a manager of managers, its approach is to encourage its managers and partners to be transparent about their responsible investment practices.

Frequency of contribution

- Quarterly or more frequently
- Biannually
- Annually
- Less frequently than annually
- Ad hoc
- Other

- Spoke publicly at events and conferences to promote responsible investment
- Wrote and published in-house research papers on responsible investment
- Encouraged the adoption of the PRI

Description

Since the RRMD is primarily a manager of managers, its approach is to encourage managers and partners to join the PRI. Also, the RRMD encourages other institutional investors to join the PRI.

Frequency of contribution

- Quarterly or more frequently
- Biannually
- Annually
- Less frequently than annually
- Ad hoc
- Other

- Responded to RI related consultations by non-governmental organisations (OECD, FSB etc.)
- Wrote and published articles on responsible investment in the media
- A member of PRI advisory committees/ working groups, specify
- On the Board of, or officially advising, other RI organisations (e.g. local SIFs)
- Other, specify

No

SG 10.3 Describe any additional actions and initiatives that your organisation has taken part in during the reporting year to promote responsible investment [Optional]

The DGPP Division employees try to participate more actively to responsible investment activities or training.

An employee of DGPP Division is a member of the Desjardins Group ESG Steering Committee (internal committee) and 2 employees of the DGPP sit on the working group of the Desjardins Group Steering Committee.

SG 11	Voluntary	Additional Assessed	PRI 4,5,6
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Private

SG 12	Mandatory	Core Assessed	PRI 4								
SG 12.1	Indicate whether your organisation uses investment consultants.										
<input type="checkbox"/> Yes, we use investment consultants <input checked="" type="checkbox"/> No, we do not use investment consultants.											
SG 12.5	Indicate whether your organisation considers any of the following responsible investment factors in the monitoring of fiduciary managers										
<input checked="" type="checkbox"/> Including responsible investment as a standard agenda item at performance review meetings <input checked="" type="checkbox"/> Discussing whether the fiduciary manager has acted in accordance with your organisation's overall investment beliefs/ strategy/ policy on responsible investment and ESG factors <input checked="" type="checkbox"/> Reviewing the fiduciary manager's PRI Transparency or Assessment reports <input checked="" type="checkbox"/> Reviewing the fiduciary manager's responsible investment reporting (excluding PRI generated reports) <input checked="" type="checkbox"/> Reviewing ESG characteristics/factors used by the fiduciary manager in portfolio construction <input checked="" type="checkbox"/> Reviewing the fiduciary manager's incorporation approaches of ESG through-out asset classes <input checked="" type="checkbox"/> Reviewing the impact of ESG factors on financial performance <input checked="" type="checkbox"/> Encouraging your fiduciary managers to consider joining responsible investment initiatives/organisations or participate in educational or collaborative projects with other investors <input checked="" type="checkbox"/> Including responsible investment criteria as a formal component of overall manager performance evaluation <input checked="" type="checkbox"/> Reviewing the fiduciary manager's ESG incorporation in external managers' selection, appointment, monitoring <input type="checkbox"/> Reviewing how ESG materiality is defined by the fiduciary manager <input type="checkbox"/> Other general aspects of your monitoring; specify <input type="checkbox"/> We do not consider responsible investment in the monitoring processes for fiduciary managers.											
SG 13	Mandatory	Descriptive	PRI 1								
SG 13.1	Indicate whether the organisation carries out scenario analysis and/or modelling, and if it does, provide a description of the scenario analysis (by asset class, sector, strategic asset allocation, etc.).										
<input type="checkbox"/> Yes, in order to assess future ESG factors <input type="checkbox"/> Yes, in order to assess future climate-related risks and opportunities <input checked="" type="checkbox"/> No, our organisation does not currently carry out scenario analysis and/or modelling											
SG 14	Mandatory to Report, Voluntary to Disclose	Additional Assessed	PRI 1								
Private											
SG 14 CC	Voluntary		General								
Private											
SG 15	Mandatory to Report, Voluntary to Disclose	Descriptive	PRI 1								
Private											
SG 17	Mandatory	Descriptive	General								
SG 17.1	Describe how you address ESG issues for externally managed assets for which a specific PRI asset class module has yet to be developed or for which you are not required to report because your assets are below the minimum threshold.										
<table border="1"> <thead> <tr> <th>Asset Class</th> <th>Describe what processes are in place and the outputs or outcomes achieved</th> </tr> </thead> <tbody> <tr> <td>Other (1) [as defined in Organisational Overview module]</td> <td>RRMD incorporates ESG into his external manager selection process and it incorporates ESG into his external manager monitoring process.</td> </tr> </tbody> </table>				Asset Class	Describe what processes are in place and the outputs or outcomes achieved	Other (1) [as defined in Organisational Overview module]	RRMD incorporates ESG into his external manager selection process and it incorporates ESG into his external manager monitoring process.				
Asset Class	Describe what processes are in place and the outputs or outcomes achieved										
Other (1) [as defined in Organisational Overview module]	RRMD incorporates ESG into his external manager selection process and it incorporates ESG into his external manager monitoring process.										
SG 18	Voluntary	Descriptive	General								
Private											
SG 19	Mandatory	Core Assessed	PRI 2, 6								
SG 19.1	Indicate whether your organisation typically discloses asset class specific information proactively. Select the frequency of the disclosure to clients/beneficiaries and the public, and provide a URL to the public information.										
<table border="1"> <tr> <td colspan="2">Selection, Appointment and Monitoring</td> </tr> <tr> <td colspan="2">Do you disclose?</td> </tr> <tr> <td colspan="2"> <input type="radio"/> We do not disclose to either clients/beneficiaries or the public. <input checked="" type="radio"/> We disclose to clients/beneficiaries only. <input type="radio"/> We disclose to the public </td> </tr> <tr> <td colspan="2">Disclosure to clients/beneficiaries</td> </tr> </table>				Selection, Appointment and Monitoring		Do you disclose?		<input type="radio"/> We do not disclose to either clients/beneficiaries or the public. <input checked="" type="radio"/> We disclose to clients/beneficiaries only. <input type="radio"/> We disclose to the public		Disclosure to clients/beneficiaries	
Selection, Appointment and Monitoring											
Do you disclose?											
<input type="radio"/> We do not disclose to either clients/beneficiaries or the public. <input checked="" type="radio"/> We disclose to clients/beneficiaries only. <input type="radio"/> We disclose to the public											
Disclosure to clients/beneficiaries											

Disclosure to clients/beneficiaries	
<input checked="" type="checkbox"/>	How responsible investment considerations are included in manager selection, appointment and monitoring processes
<input type="checkbox"/>	Details of the responsible investment activities carried out by managers on your behalf
<input type="checkbox"/>	E, S and/or G impacts and outcomes that have resulted from your managers' investments and/or active ownership
<input type="checkbox"/>	Other
Annually	

Listed equity – (Proxy) Voting

Do you disclose?	
<input type="radio"/>	We do not disclose to either clients/beneficiaries or the public.
<input checked="" type="radio"/>	We disclose to clients/beneficiaries only.
<input type="radio"/>	We disclose to the public

Disclosure to clients/beneficiaries	
Disclosure to clients/beneficiaries	
<input type="radio"/>	Disclose all voting decisions
<input checked="" type="radio"/>	Disclose some voting decisions
<input type="radio"/>	Only disclose abstentions and votes against management
Annually	

If there are any messages below, please review them before continuing. If there are no messages below, please save this page and continue.

SAM 01.1 Indicate which of the following ESG incorporation strategies you require your external manager(s) to implement on your behalf for all your listed equity and/or fixed income assets:

Active investment strategies				
Active investment strategies	Listed Equity	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)
Screening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thematic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None of the above	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Passive investment strategies			
Passive investment strategies	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)
Screening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thematic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None of the above	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SAM 02.1 Indicate what RI-related information your organisation typically covers in the majority of selection documentation for your external managers

	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
Your organisation's investment strategy and how ESG objectives relate to it	<input checked="" type="checkbox"/>						
ESG incorporation requirements	<input type="checkbox"/>						
ESG reporting requirements	<input type="checkbox"/>						
Other	<input type="checkbox"/>						
No RI information covered in the selection documentation	<input type="checkbox"/>						

SAM 02.2 Explain how your organisation evaluates the investment manager's ability to align between your investment strategy and their investment approach

Strategy							
	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
Assess the time horizon of the investment manager's offering vs. your/beneficiaries' requirements	<input checked="" type="checkbox"/>						
Assess the quality of investment policy and its reference to ESG	<input checked="" type="checkbox"/>						
Assess the investment approach and how ESG objectives are implemented in the investment process	<input checked="" type="checkbox"/>						
Review the manager's firm-level vs. product-level approach to RI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Assess the ESG definitions to be used	<input type="checkbox"/>						
Other	<input type="checkbox"/>						
None of the above	<input type="checkbox"/>						

ESG people/oversight							
	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
Assess ESG expertise of investment teams	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Review the oversight and responsibilities of ESG implementation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review how is ESG implementation enforced /ensured	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review the manager's RI-promotion efforts and engagement with the industry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>						
None of the above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Process/portfolio construction/investment valuation

	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
Review the process for ensuring the quality of the ESG data used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review and agree the use of ESG data in the investment decision making process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review and agree the impact of ESG analysis on investment decisions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Review and agree ESG objectives (e.g. risk reduction, return seeking, real-world impact)	<input type="checkbox"/>						
Review and agree manager's ESG risk framework	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Review and agree ESG risk limits at the portfolio level (portfolio construction) and other ESG objectives	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Review how ESG materiality is evaluated by the manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review process for defining and communicating on ESG incidents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review and agree ESG reporting frequency and detail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, specify	<input type="checkbox"/>						
None of the above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SAM 02.3 Indicate the selection process and its ESG/RI components

- Review ESG/RI responses to RfP, RfI, DDQ etc.
- Review responses to PRI's Limited Partners' Responsible Investment Due Diligence Questionnaire (LP DDQ)
- Review publicly available information on ESG/RI
- Review assurance process on ESG/RI data and processes
- Review PRI Transparency Reports
- Request and discuss PRI Assessment Reports
- Meetings with the potential shortlisted managers covering ESG/RI themes
- Site visits to potential managers offices
- Other, specify

SAM 02.4 When selecting external managers does your organisation set any of the following:

	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
ESG performance development targets	<input type="checkbox"/>						
ESG score	<input checked="" type="checkbox"/>						
ESG weight	<input checked="" type="checkbox"/>						
Real world economy targets	<input type="checkbox"/>						
Other RI considerations	<input type="checkbox"/>						
None of the above	<input type="checkbox"/>						

SAM 02.5 Describe how the ESG information reviewed and discussed affects the selection decision making process.[OPTIONAL]

Non satisfactory ESG processes and policies of the manager could lead to a refusal.

SAM 03

Mandatory

Additional Assessed

PRI 2

SAM 03.1 Indicate how your organisation typically evaluates the manager's active ownership practices in the majority of the manager selection process.

Engagement				
	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)
Review the manager's engagement policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review the manager's engagement process (with examples and outcomes)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure whether engagement outcomes feed back into the investment decision-making process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other engagement issues in your selection process specify	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If you select 'Other' option, specify

None of the above

SAM 03.2 Describe how you assess if the manager's engagement approach is effective.

- Impact on investment decisions
- Financial impact on target company or asset class
- Impact on ESG profile of company or the portfolio
- Evidence of changes in corporate practices(i.e. ESG policies and implementation activities)
- Other, specify
- None of the above

SAM 04 Mandatory Core Assessed PRI 1

SAM 04.1 Indicate if in the majority of cases and where the structure of the product allows, your organisation does any of the following as part of the manager appointment and/or commitment process

- Sets standard benchmarks or ESG benchmarks
- Defines ESG objectives and/ or ESG related exclusions/restrictions
- Sets incentives and controls linked to the ESG objectives
- Requires reporting on ESG objectives
- Requires the investment manager to adhere to ESG guidelines, regulations, principles or standards
- Other, specify (1)
- Other, specify (2)
- None of the above

SAM 04.2 Provide an example per asset class of your benchmarks, objectives, incentives/controls and reporting requirements that would typically be included in your managers' appointment.

Asset class								
<input checked="" type="checkbox"/> Listed equity (LE) <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Benchmark</th> </tr> </thead> <tbody> <tr> <td> <input checked="" type="checkbox"/> Standard benchmark <input type="checkbox"/> ESG benchmark, specify </td> </tr> <tr> <th>ESG Objectives</th> </tr> <tr> <td> <input checked="" type="checkbox"/> We do not define ESG objectives </td> </tr> <tr> <th>Incentives and controls</th> </tr> <tr> <td> <input checked="" type="checkbox"/> We do not set incentives and controls </td> </tr> <tr> <th>Reporting requirements</th> </tr> <tr> <td> <input checked="" type="checkbox"/> We do not require the reporting on ESG objectives </td> </tr> </tbody> </table>	Benchmark	<input checked="" type="checkbox"/> Standard benchmark <input type="checkbox"/> ESG benchmark, specify	ESG Objectives	<input checked="" type="checkbox"/> We do not define ESG objectives	Incentives and controls	<input checked="" type="checkbox"/> We do not set incentives and controls	Reporting requirements	<input checked="" type="checkbox"/> We do not require the reporting on ESG objectives
Benchmark								
<input checked="" type="checkbox"/> Standard benchmark <input type="checkbox"/> ESG benchmark, specify								
ESG Objectives								
<input checked="" type="checkbox"/> We do not define ESG objectives								
Incentives and controls								
<input checked="" type="checkbox"/> We do not set incentives and controls								
Reporting requirements								
<input checked="" type="checkbox"/> We do not require the reporting on ESG objectives								
<input checked="" type="checkbox"/> Fixed income - SSA (SSA) <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Benchmark</th> </tr> </thead> <tbody> <tr> <td> <input checked="" type="checkbox"/> Standard benchmark, specify 60% passive portfolio return + 20% FTSE Canada Universe Provincial + 20% FTSE Canada Long Term Provincial </td> </tr> <tr> <td> <input type="checkbox"/> ESG benchmark, specify </td> </tr> <tr> <th>ESG Objectives</th> </tr> </tbody> </table>	Benchmark	<input checked="" type="checkbox"/> Standard benchmark, specify 60% passive portfolio return + 20% FTSE Canada Universe Provincial + 20% FTSE Canada Long Term Provincial	<input type="checkbox"/> ESG benchmark, specify	ESG Objectives				
Benchmark								
<input checked="" type="checkbox"/> Standard benchmark, specify 60% passive portfolio return + 20% FTSE Canada Universe Provincial + 20% FTSE Canada Long Term Provincial								
<input type="checkbox"/> ESG benchmark, specify								
ESG Objectives								

We do not define ESG objectives

Incentives and controls

We do not set incentives and controls

Reporting requirements

We do not require the reporting on ESG objectives

Fixed income - Corporate (financial)

Benchmark

Standard benchmark, specify

60% passive portfolio return + 20% FTSE Canada Universe Provincial + 20% FTSE Canada Long Term Provincial

ESG benchmark, specify

ESG Objectives

We do not define ESG objectives

Incentives and controls

We do not set incentives and controls

Reporting requirements

We do not require the reporting on ESG objectives

Fixed income - Corporate (non-financial)

Benchmark

Standard benchmark, specify

60% passive portfolio return + 20% FTSE Canada Universe Provincial + 20% FTSE Canada Long Term Provincial

ESG benchmark, specify

ESG Objectives

We do not define ESG objectives

Incentives and controls

We do not set incentives and controls

Reporting requirements

We do not require the reporting on ESG objectives

Private equity

Benchmark

Standard benchmark, specify

MSCI World

ESG benchmark, specify

ESG Objectives

We do not define ESG objectives

Incentives and controls

We do not set incentives and controls

Reporting requirements

We do not require the reporting on ESG objectives

Property

Benchmark

Standard benchmark, specify

50% IPD Canada + 50% NCREIF ODCE US

ESG benchmark, specify

ESG Objectives

We do not define ESG objectives

Incentives and controls

- We do not set incentives and controls

Reporting requirements

- We do not require the reporting on ESG objectives

- Infrastructure

Benchmark

- Standard benchmark, specify
JP Morgan Long Term Assumption for Global Infrastructure + 100 bps
- ESG benchmark, specify

ESG Objectives

- We do not define ESG objectives

Incentives and controls

- We do not set incentives and controls

Reporting requirements

- We do not require the reporting on ESG objectives

SAM 04.3 Indicate which of these actions your organisation might take if any of the requirements are not met

- Discuss requirements not met and set project plan to rectify
- Place investment manager on a "watch list"
- Track and investigate reason for non-compliance
- Re-negotiate fees
- Failing all actions, terminate contract with the manager
- Other, specify

Infrastructure: Discuss with the manager to understand better their strategy. We could sell the fund on secondary market if needed.

- No actions are taken if any of the ESG requirements are not met

SAM 05 Mandatory Core Assessed PRI 1

SAM 05.1 When monitoring managers, indicate which of the following types of responsible investment information your organisation typically reviews and evaluates

	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
ESG objectives linked to investment strategy (with examples)	<input type="checkbox"/>						
Evidence on how the ESG incorporation strategy(ies) affected the investment decisions and financial / ESG performance of the portfolio/fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Compliance with investment restrictions and any controversial investment decisions	<input checked="" type="checkbox"/>						
ESG portfolio characteristics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How ESG materiality has been evaluated by the manager in the monitored period	<input type="checkbox"/>						
Information on any ESG incidents	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Metrics on the real economy influence of the investments	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
PRI Transparency Reports	<input type="checkbox"/>						
PRI Assessment Reports	<input type="checkbox"/>						
RI-promotion and engagement with the industry to enhance RI implementation	<input type="checkbox"/>						
Changes to the oversight and responsibilities of ESG implementation	<input type="checkbox"/>						
Other general RI considerations in investment management agreements; specify	<input type="checkbox"/>						
None of the above	<input type="checkbox"/>						

SAM 05.2 When monitoring external managers, does your organisation set any of the following to measure compliance/progress

	LE	FI - SSA	FI - Corporate (financial)	FI - Corporate (non-financial)	Private equity	Property	Infrastructure
ESG score	<input type="checkbox"/>						
ESG weight	<input type="checkbox"/>						
ESG performance minimum threshold	<input type="checkbox"/>						
Real world economy targets	<input type="checkbox"/>						
Other RI considerations	<input type="checkbox"/>						
None of the above	<input checked="" type="checkbox"/>						

SAM 08 Mandatory to Report, Voluntary to Disclose Descriptive PRI 1

Private

SAM 09 Mandatory Additional Assessed PRI 1,6

SAM 09.1 Provide examples of how ESG issues have been addressed in the manager selection, appointment and/or monitoring process for your organisation during the reporting year.

Add Example 1

Topic or issue	Manager selection
Conducted by	Internal staff
Asset class	All asset classes
Scope and process	Establish what are the ESG practices in place and assess the manager's development and performance in the area.
Outcomes	We make sure that those are in line with our ESG view and policies before making the final decision.

Add Example 2

Add Example 3

Add Example 4

Add Example 5

Add Example 6

Add Example 7

We are not able to provide examples

SAM 09.2 Additional information.

The infrastructure team as a slightly different approach : 1) It establishes what are the ESG practices in place. 2) It makes sure that those are in line with our ESG view and policies before making the final decision.

SAM Checks Checks

If there are any messages below, please review them before continuing. If there are no messages below, please save this page and continue.

LEA 01.1 Indicate whether your organisation has an active ownership policy (includes engagement and/or voting).

Yes

LEA 01.2 Attach or provide a URL to your active ownership policy.

Attachment provided:

Files: link

URL provided:

LEA 01.3 Indicate what your active engagement policy covers:

General approach to Active Ownership

- Conflicts of interest
- Alignment with national stewardship code requirements
- Assets/funds covered by active ownership policy
- Expectations and objectives
- Engagement approach
- (Proxy) voting approach

Voting

- ESG issues
- Prioritisation and scope of voting activities
- Methods of voting
- Transparency of voting activities
- Regional voting practice approaches
- Filing or co-filing resolutions
- Company dialogue pre/post-vote
- Decision-making processes
- Securities lending processes
- Other, (specify)

Other

None of the above

No

LEA 01.4 Do you outsource any of your active ownership activities to service providers?

Yes

No

LEA 12.1 Indicate how you typically make your (proxy) voting decisions.

Approach

- We use our own research or voting team and make voting decisions without the use of service providers.
- We hire service providers who make voting recommendations and/or provide research that we use to guide our voting decisions.
- We hire service providers who make voting decisions on our behalf, except in some pre-defined scenarios where we review and make voting decisions.

Based on

- The service-provider voting policy we sign off on
- Our own voting policy
- Our clients' requests or policies
- Other (explain)

We hire service providers who make voting decisions on our behalf.

LEA 12.2 Provide an overview of how you ensure that your agreed-upon voting policy is adhered to, giving details of your approach when exceptions to the policy are made.

We investigate every occurrence where a vote has been casted against our policy. In the last year, this has happen only a couple time and was related to propositions, often on very specific issues from shareholders where our policy did not cover those specific issues.

LEA 13.1	Of the voting recommendations that your service provider made in the reporting year, indicate the percentage that was reviewed by your organisation, giving the reasons.
Percentage of voting recommendations your organisation reviewed	
<input type="radio"/> 100-75%, <input type="radio"/> 74-50%, <input type="radio"/> 49-25%, <input checked="" type="radio"/> 24-1% <input type="radio"/> None	
Reasons for review	
<input type="checkbox"/> Specific environmental and/or social issues <input checked="" type="checkbox"/> Votes concerning significant holdings <input checked="" type="checkbox"/> Votes against management and/or abstentions <input type="checkbox"/> Conflicts of interest <input checked="" type="checkbox"/> Corporate action, such as M&As, disposals, etc. <input type="checkbox"/> Votes concerning companies with which we have an active engagement <input type="checkbox"/> Client requests <input type="checkbox"/> Ad-hoc oversight of service provider <input checked="" type="checkbox"/> Shareholder resolutions <input type="checkbox"/> Share blocked securities <input type="checkbox"/> Other (explain)	

LEA 15	Mandatory	Descriptive	PRI 2
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LEA 15.1	Indicate the proportion of votes participated in within the reporting year in which where you or the service providers acting on your behalf raised concerns with companies ahead of voting.
<input type="radio"/> 100% <input type="radio"/> 99-75% <input type="radio"/> 74-50% <input type="radio"/> 49-25% <input checked="" type="radio"/> 24-1% <input type="radio"/> Neither we nor our service provider(s) raise concerns with companies ahead of voting	

LEA 15.2	Indicate the reasons for raising your concerns with these companies ahead of voting.
<input type="checkbox"/> Vote(s) concerned selected markets <input type="checkbox"/> Vote(s) concerned selected sectors <input checked="" type="checkbox"/> Vote(s) concerned certain ESG issues <input type="checkbox"/> Vote(s) concerned companies exposed to controversy on specific ESG issues <input type="checkbox"/> Vote(s) concerned significant shareholdings <input type="checkbox"/> Client request <input type="checkbox"/> Other	

LEA 16	Mandatory	Core Assessed	PRI 2
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LEA 16.1	Indicate the proportion of votes where you, and/or the service provider(s) acting on your behalf, communicated the rationale to companies for abstaining or voting against management recommendations. Indicate this as a percentage out of all eligible votes.
<input type="radio"/> 100% <input type="radio"/> 99-75% <input type="radio"/> 74-50% <input type="radio"/> 49-25% <input checked="" type="radio"/> 24-1% <input type="radio"/> We do not communicate the rationale to companies <input type="radio"/> Not applicable because we and/or our service providers did not abstain or vote against management recommendations	

LEA 16.2	Indicate the reasons why your organisation would communicate to companies, the rationale for abstaining or voting against management recommendations.
<input checked="" type="checkbox"/> Vote(s) concern selected markets <input type="checkbox"/> Vote(s) concern selected sectors <input checked="" type="checkbox"/> Vote(s) concern certain ESG issues <input checked="" type="checkbox"/> Vote(s) concern companies exposed to controversy on specific ESG issues <input type="checkbox"/> Vote(s) concern significant shareholdings	

- Client request
- Other

LEA 16.3 In cases where your organisation does communicate the rationale for abstaining or voting against management recommendations, indicate whether this rationale is made public.

- Yes
- No

LEA 17	Mandatory	Core Assessed	PRI 2
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LEA 17.1 For listed equities in which you or your service provider have the mandate to issue (proxy) voting instructions, indicate the percentage of votes cast during the reporting year.

- We do track or collect this information

Votes cast (to the nearest 1%)	98.1%
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Specify the basis on which this percentage is calculated

- Of the total number of ballot items on which you could have issued instructions
- Of the total number of company meetings at which you could have voted
- Of the total value of your listed equity holdings on which you could have voted
- We do not track or collect this information

LEA 17.2 Explain your reason(s) for not voting on certain holdings

- Shares were blocked
- Notice, ballots or materials not received on time
- Missed deadline
- Geographical restrictions (non-home market)
- Cost
- Conflicts of interest
- Holdings deemed too small
- Administrative impediments (e.g., power of attorney requirements, ineligibility due to participation in share placement)
- Client request
- Other (explain)

LEA 18	Voluntary	Additional Assessed	PRI 2
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Private

LEA 19	Mandatory	Core Assessed	PRI 2
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LEA 19.1 Indicate whether your organisation has a formal escalation strategy following unsuccessful voting.

- Yes
- No

LEA 19.2 Indicate the escalation strategies used at your organisation following abstentions and/or votes against management.

- Contacting the company's board
- Contacting the company's senior management
- Issuing a public statement explaining the rationale
- Initiating individual/collaborative engagement
- Directing service providers to engage
- Reducing exposure (holdings) / divestment
- Other

Specify	96,6% of our ballots are casted. We investigate the reasons why a vote was rejected or not voted. (PoA or clerical error etc.)
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LEA Checks	Checks
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- If there are any messages below, please review them before continuing. If there are no messages below, please save this page and continue.

CM1 01	Mandatory	Additional Assessed	General
CM1 01.1	Indicate whether the reported information you have provided for your PRI Transparency Report this year has undergone:		
<input type="checkbox"/> Third party assurance over selected responses from this year's PRI Transparency Report <input type="checkbox"/> Third party assurance over data points from other sources that have subsequently been used in your PRI responses this year <input type="checkbox"/> Third party assurance or audit of the correct implementation of RI processes (that have been reported to the PRI this year) <input type="checkbox"/> Internal audit of the correct implementation of RI processes and/or accuracy of RI data (that have been reported to the PRI this year) <input checked="" type="checkbox"/> Internal verification of responses before submission to the PRI (e.g. by the CEO or the board) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Whole PRI Transparency Report has been internally verified <input type="checkbox"/> Selected data has been internally verified <input type="checkbox"/> Other, specify <input type="checkbox"/> None of the above			
CM1 02	Mandatory	Descriptive	General
CM1 02.1	We undertook third party assurance on last year's PRI Transparency Report		
<input type="radio"/> Whole PRI Transparency Report was assured last year <input type="radio"/> Selected data was assured in last year's PRI Transparency Report <input checked="" type="radio"/> We did not assure last year's PRI Transparency report <input type="radio"/> None of the above, we were in our preparation year and did not report last year.			
CM1 03	Mandatory	Descriptive	General
CM1 03.1	We undertake confidence building measures that are unspecific to the data contained in our PRI Transparency Report:		
<input type="checkbox"/> We adhere to an RI certification or labelling scheme <input type="checkbox"/> We carry out independent/third party assurance over a whole public report (such as a sustainability report) extracts of which are included in this year's PRI Transparency Report <input type="checkbox"/> ESG audit of holdings <input type="checkbox"/> Other, specify <input checked="" type="checkbox"/> None of the above			
CM1 04	Mandatory	Descriptive	General
CM1 04.1	Do you plan to conduct third party assurance of this year's PRI Transparency report?		
<input type="radio"/> Whole PRI Transparency Report will be assured <input type="radio"/> Selected data will be assured <input checked="" type="radio"/> We do not plan to assure this year's PRI Transparency report			
CM1 07	Mandatory	Descriptive	General
CM1 07.1	Indicate who has reviewed/verified internally the whole - or selected data of the - PRI Transparency Report . and if this applies to selected data please specify what data was reviewed		
<input type="checkbox"/> CEO or other Chief-Level staff <input type="checkbox"/> The Board <input type="checkbox"/> Investment Committee <input type="checkbox"/> Compliance Function <input type="checkbox"/> RI/ESG Team <input checked="" type="checkbox"/> Investment Teams <input checked="" type="checkbox"/> Legal Department <input type="checkbox"/> Other (specify)			