

# BBGI ESG Swiss Equities Strategies

# CHF

A BBGI exclusivity since 1999

August 2022

Annualized performance since 1999

From +5.74% to +7.49%

## ESG indices do not escape the general decline

	August	YTD
<b>BBGI ESG Swiss Equities Core</b>	<b>-3.95%</b>	<b>-18.14%</b>
<b>BBGI ESG Swiss Equities Mid</b>	<b>-3.93%</b>	<b>-16.49%</b>
<b>BBGI ESG Swiss Equities Broad</b>	<b>-3.46%</b>	<b>-16.97%</b>

### Investment climate:

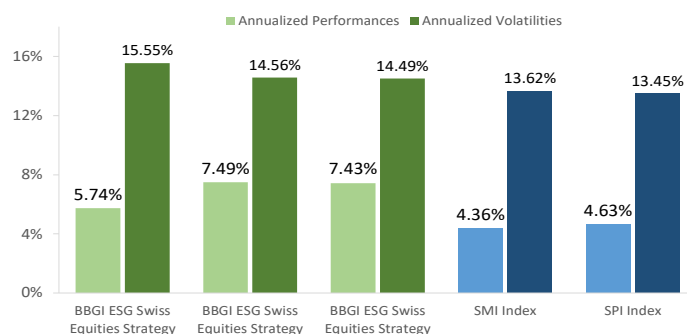
The Swiss economy ended the summer in a mixed fashion. Indeed, some leading indicators are still on a downward trajectory. The manufacturing PMI continued to fall in August, dropping from 58 to 56.5 points. The services index, on the other hand, returned to growth and interrupted the negative trend of the last few months by climbing from 55.2 to 56.9 points. The KOF Economic Barometer continues its decline of recent periods and now stands at 86.5 points. While inflation rose very slightly in August. The CPI rose by +3.50% year-on-year compared to a +3.40% increase last month and could show signs of stabilizing around these levels for the last 3 months. Over one month, the increase is thus small (+0.3%). The increase in production prices is slowing down annually from +4.11% to +3.80% and import prices are also slowing down (+10.80% to +8.90% YoY).

The Swiss stock market is no exception to the general financial market correction and is also on the decline. The 20 largest Swiss stock market valuations in the SMI are down -2.61% and are once again in decline after a surge in July. The broader SPI performance index also declined in August, falling -3.06%. Also, the unemployment rate fell from 2.2% to 2.1%.

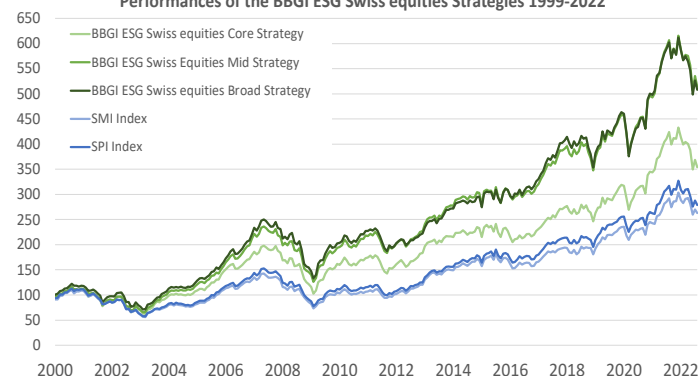
**The performances of the BBGI ESG Swiss Equities strategies were negative in August as volatility returned to the markets.** Indeed, the "core" strategy, which includes the 20 stocks of the SMI weighted according to their BBGI ESG rating, made a loss this month and fell by **-3.95%** and was the worst performer this month. The "mid" strategy, which includes the 40 largest Swiss market capitalizations, fell by **-3.93%**. The "broad" approach, which includes the 60 largest companies, also followed the same path and lost **-3.46%**.

Since their creation, **the BBGI ESG Swiss Equities indices** have always performed very well **(+5.74% to +7.49%)** and have outperformed the classic performance indices in annualized terms **(SMI & SPI +4.36% to +4.63%)**.

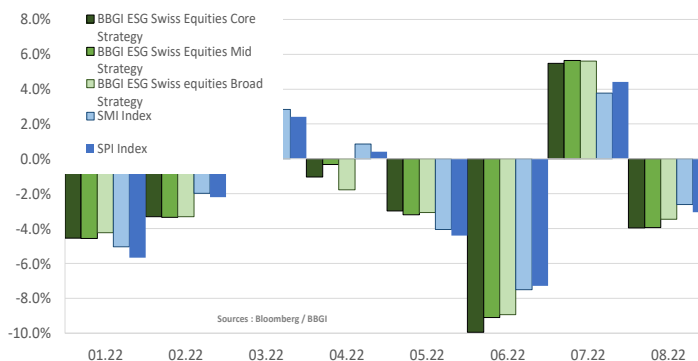
Annualized performances of the BBGI ESG Swiss equities Strategies 1999-2022



Performances of the BBGI ESG Swiss equities Strategies 1999-2022



Monthly Performances of the BBGI ESG Swiss equities Strategies in 2022



**The systemically diversified strategies of the BBGI ESG Swiss Equities Indices have generated annualized returns ranging from +5.74% to +7.49% since 1999 to date.**

The composition of our strategies is available upon request