

SUSTAINABILITY – RELATED DISCLOSURES – POSTEPREMIUM SOLUZIONE ASSICURATIVA

Summary

The insurance-based investment product “PostePremium Soluzione Assicurativa” is a multi-branch financial product that promotes, among others, environmental and/or social characteristics in accordance with Article 8 of Regulation (EU) 2019/2088 of the European Parliament and of the Council of 27 November 2019. **Compliance with the promotion of these characteristics depends on the investment in at least one of the investment options included in the list below and the holding of at least one of these options during the holding period of the financial product.**

INVESTMENT OPTIONS	CATEGORY OF OPTION	LINK
Amundi Emerging Markets Equity Focus	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/investitori_qualificati/dl/doc/website-sfdr-disclosure/LU0329442304/ENG
Amundi EUR Corporate Bond ESG	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/pdfDocuments/website-sfdr-disclosure/LU1437018168/ITA/ITA
Amundi Global Equity Income Select	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/dl/doc/website-sfdr-disclosure/LU2002722341/ENG/20230101?inline
Amundi Global Equity Responsible	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/investitori_qualificati/dl/doc/website-sfdr-disclosure/LU1883320308/ENG
Amundi Global MA Conservative	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/investitori_qualificati/dl/doc/website-sfdr-disclosure/LU1883330109/ENG
Amundi Global MA Target Income EURH	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/investitori_qualificati/dl/doc/website-sfdr-disclosure/LU1883332816/ENG
Amundi Income Opportunities	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/investitori_qualificati/dl/doc/website-sfdr-disclosure/LU2002723158/ENG
Amundi MSCI NA ESG Broad Transition	Art.8 – Regulation (EU) 2019/2088	https://www.amundi.it/investitori_qualificati/dl/doc/website-sfdr-disclosure/LU0389812008/ITA/ITA
Anima Europe Equity	Art.8 – Regulation (EU) 2019/2088	https://www.animasgr.it/d/IT/Downloads/Documents/DisclosureExArt10_AnimaEuropeEquity.pdf
Anima Liquidity	Art.8 – Regulation (EU) 2019/2088	https://www.animasgr.it/d/IT/Downloads/Documents/DisclosureExArt10_AnimaLiquidity.pdf
Anima US Equity	Art.8 – Regulation (EU) 2019/2088	https://www.animasgr.it/d/IT/Downloads/Documents/DisclosureExArt10_AnimaUSEquity.pdf
JPM Europe Equity Plus	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/549300QCZKNLQQL80M68_IT.pdf
BGF World Healthscience	Art.8 – Regulation (EU) 2019/2088	https://www.blackrock.com/lu/intermediaries/products/307954/
Fidelity Global Technology	Art.8 – Regulation (EU) 2019/2088	https://www.fidelity-italia.it/fondi/scheda-informativa/LU0346389348/tab-disclosure
BlackRock Advantage US Equity	Art.8 – Regulation (EU) 2019/2088	https://www.blackrock.com/ch/individual/en/products/304988/blackrock-advantage-us-equity-fund

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BSF European Select Strategies	Art.8 – Regulation (EU) 2019/2088	https://www.blackrock.com/uk/individual/products/284531/blackrock-european-select-strategies-fund
Eurizon Euro Bond	Art.8 – Regulation (EU) 2019/2088	https://api.fundinfo.com/document/a4cb3794d488213c103c13bc08597358_75910/EWD_IT_it_LU0278427041_YES_2024-07-19.pdf?apiKey=12d3808a-c63c-4a45-aa8a-9f71ef1d5141
Eurizon Q-Flexible	Art.8 – Regulation (EU) 2019/2088	https://api.fundinfo.com/document/4fe15ed5f0a06d1f77716d20371baaf8_87150/EWD_IT_it_LU0365359545_YES_2024-07-19.pdf?apiKey=12d3808a-c63c-4a45-aa8a-9f71ef1d5141
Eurizon Global Bond	Art.8 – Regulation (EU) 2019/2088	https://www.eurizoncapital.com/it-IT/offerta/documentazione-risultati?PFFD_ISIN=LU1652387702&PFFD_SearchType=ForeignCountries
Eurizon Sustainable Japan Equity	Art.8 – Regulation (EU) 2019/2088	https://www.eurizoncapital.com/it-IT/offerta/documentazione-risultati?PFFD_ISIN=LU1543693680&PFFD_SearchType=ForeignCountries
Eurizon Top European Research	Art.8 – Regulation (EU) 2019/2088	https://www.eurizoncapital.com/it-IT/offerta/documentazione-risultati?PFFD_ISIN=LU1393924268&PFFD_SearchType=ForeignCountries
Fidelity American Growth	Art.8 – Regulation (EU) 2019/2088	https://www.fidelity-italia.it/fondi/scheda-informativa/LU1338166587/tab-disclosure
SISF Asian Equity Yield	Art.8 – Regulation (EU) 2019/2088	https://api.schroders.com/document-store/Schroder%20ISF%20Asian%20Equity%20Yield_SUSRELD_IT_IT.pdf
Fidelity European Dividend	Art.8 – Regulation (EU) 2019/2088	https://www.fidelity-italia.it/fondi/scheda-informativa/LU0353648032/tab-disclosure
Fidelity Global Consumer Brands	Art.8 – Regulation (EU) 2019/2088	https://www.fidelity-italia.it/fondi/scheda-informativa/LU0346388613/tab-disclosure
HSBC Japan Screened Equity	Art.8 – Regulation (EU) 2019/2088	https://www.assetmanagement.hsbc.it/it/qualified-investor/fund-centre/ie00bky55s33?t=5
Invesco Emerging Markets Equity	Art.8 – Regulation (EU) 2019/2088	https://www.invesco.com/content/dam/invesco/emea/en/product-documents/gpr/fund/sustainability-full-disclosure/invesco-emerging-markets-equity-fund_sustainability-full-disclosure_en.pdf
Invesco Global Income	Art.8 – Regulation (EU) 2019/2088	https://www.invescomanagementcompany.lu/dam/jcr:a2f85f24-eb6c-426a-88b4-f4e1dcf5382c/GLINC-invesco-sustainability-full-disclosure.pdf
Invesco Global Total Return Bond	Art.8 – Regulation (EU) 2019/2088	https://www.invesco.com/content/dam/invesco/emea/en/product-documents/gpr/fund/sustainability-full-disclosure/invesco-global-total-return-bond-fund_sustainability-full-disclosure_en.pdf

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Invesco Pan European High Income	Art.8 – Regulation (EU) 2019/2088	https://www.invescomanagementcompany.lu/dam/jcr:723572c8-2ee7-4c0c-9118-1db8bc45660e/CEABSOL-invesco-sustainability-full-disclosure.pdf
JPM EM IG Bond EURH	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/5493005CFYFC20Y2VM74_IT.pdf
JPM Europe REI Equity Active	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/549300RYCHMI4P7EKH68_IT.pdf
JPM Europe Sustainable Equity	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/2221001DXUMAQS2GZM29_IT.pdf
JPM Global Corporate Bond EURH	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/EO1ZF4VK19CZVPQNRJ56_IT.pdf
JPM Global Income	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/549300UM36FI5S3NTV94_IT.pdf
JPM Global REI Equity Active	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/5493003MML3DKPLHHR48_IT.pdf
JPM US Select Equity	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/549300OUK228X44T7358_IT.pdf
JPM US Value	Art.8 – Regulation (EU) 2019/2088	https://www.pl.jpnam.avanterra.com/ESG/WD/549300ICWRHFZD5W6646_IT.pdf
M&G European Credit Investment	Art.8 – Regulation (EU) 2019/2088	https://www.mandg.com/investments/professional-investor/it-it/funds/mg-european-credit-investment-fund/lu2188668326
M&G European Strategic Value	Art.8 – Regulation (EU) 2019/2088	https://www.mandg.com/investments/professional-investor/it-it/funds/mg-lux-european-strategic-value-fund/lu1797811236
M&G Global Dividend	Art.8 – Regulation (EU) 2019/2088	https://www.mandg.com/investments/professional-investor/it-it/funds/mg-lux-global-dividend-fund/lu1797813448#documents
FTGF ClearBridge Infrastructure Value	Art.8 – Regulation (EU) 2019/2088	DisclosureSFDR-LeggMasonClearBridgeInfrastructureValueFund-91548-en-GB.pdf
DWS Concept Kaldemorgen	Art.8 – Regulation (EU) 2019/2088	https://funds.dws.com/it-it/AssetDownload/Index/?filename=SFDR+Summary_LU0599946893_IT_2025-05-21.pdf&assetGuid=8bcf8dcf-0a1b-4ec5-899b-ce9df489627c&source=DWS
M&G Optimal Income	Art.8 – Regulation (EU) 2019/2088	https://www.mandg.com/investments/professional-investor/it-it/funds/mg-lux-optimal-income-fund/lu1797814339#documents
M&G Short Dated Corporate Bond	Art.8 – Regulation (EU) 2019/2088	https://www.mandg.com/investments/professional-investor/it-it/funds/mg-lux-short-dated-corporate-bond-fund/lu1797818918
M&G Sustainable Total Return Credit	Art.8 – Regulation (EU) 2019/2088	https://www.mandg.com/investments/professional-investor/it-it/funds/mg-sustainable-total-return-credit-investment-fund/lu2360509553
MSIF Euro Corporate Bond	Art.8 – Regulation (EU) 2019/2088	https://www.morganstanley.com/im/publication/msinvf/regulatorypolicy/sfdrwebsite_msinvf_investmentgradedcredit_aggregated_en.pdf?1749463027707

INVESTMENT OPTIONS	CATEGORY OF OPTION	LINK
MSIF Europe Opportunity	Art.8 – Regulation (EU) 2019/2088	https://www.morganstanley.com/im/publication/msinvf/regulatorypolicy/sfdrwebsite_msinvf_globalopportunity_aggregated_en.pdf?1749463067035
THEAM Quant Equity World GURU	Art.8 – Regulation (EU) 2019/2088	https://www.bnpparibas-am.com/en-lu/institutional/fundsheets/equity/theam-quant-equity-world-guru-i-eur-c-lu1893657996/?tab=sustainable
Pictet Japanese Equity Selection	Art.8 – Regulation (EU) 2019/2088	https://documents.am.pictet/library/en/funds/it/institutional?query=LU0255975673
PIMCO Global IG Credit ESG EURH	Art.8 – Regulation (EU) 2019/2088	https://www.pimco.it/it-it/investments/gis/global-investment-grade-credit-esg-fund/inst-eur-hedged-acc
UBS MSCI ACWI Socially Responsible	Art.8 – Regulation (EU) 2019/2088	https://www.ubs.com/2/e/files/etf_plc_msci_acwi_socially_responsible_ucits_etf_esgde.pdf
UBS MSCI EM Socially Responsible	Art.8 – Regulation (EU) 2019/2088	https://www.ubs.com/2/e/files/fund_solutions_msci_emerging_markets_socially_responsible_ucits_etf_esgde.pdf
Xtrackers MSCI USA ESG	Art.8 – Regulation (EU) 2019/2088	https://etf.dws.com/it-it/AssetDownload/Index/caf723f-4e92-4aa9-93eb-bb1786b54f31/Publication-pursuant-to-SFDR-Summary.pdf

The product also includes investment options, corresponding to the Posta ValorePiù Separately Managed Account and some external funds, which do not promote environmental and/or social characteristics.

For further information on the promotion of the environmental and/or social characteristics of the investment options, please refer to the Sustainability-related disclosures available through the above mentioned links.

No sustainable investment objective

This financial product promotes, among others, environmental and/or social characteristics but does not have sustainable investment as its objective. Specific information regarding the possible realization of sustainable investments and compliance with the principle of not significantly harming any sustainable investment objective of each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Environmental or social characteristics of the financial product

The promotion of environmental and/or social characteristics is achieved through investment in investment options in accordance with Article 8 of Regulation (EU) 2019/2088 of the European Parliament and of the Council of 27 November 2019. Specific information regarding the environmental and/or social characteristics of each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Investment strategy

Specific information on the investment strategy of each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Proportion of investments

Specific information regarding the investment shares of each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Monitoring of environmental or social characteristics

The methods for monitoring environmental and social characteristics are defined at the individual investment option level. Specific information regarding the methods for monitoring the environmental and social characteristics of each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Methodologies

The methodologies related to environmental and/or social characteristics are defined at the individual investment option level. Specific information on the methodologies related to the environmental and social characteristics of each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Data sources and processing

The sources and methods of data processing are defined at the individual investment option level. Specific information on the sources and methods of data processing for each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Limitations to methodologies and data

Any limitations of the methodologies and data are provided at the individual investment option level. Specific information on any limitations of the methodologies and data for each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Due diligence

Due diligence policies are adopted at the individual investment option level. Specific information on the due diligence policies for each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Engagement policies

The use of engagement policies, if applicable, is provided at the individual investment option level. Specific information on the use of engagement policies for each investment option can be found in the respective “Sustainability-related disclosure,” published on the websites of the Management Companies listed above.

Designated reference benchmark

The use of an index as reference benchmark, if any, shall be provided for at the level of individual investment option. Specific information on the possible use of an index as reference benchmark for each investment option is available in the relevant “Sustainability-related disclosure”, published on the websites of the Management Companies listed above.

DISCLOSURE	AMENDMENTS	EXPLANATION OF AMENDMENTS
Information pursuant to Art. 10 of Regulation EU 2019/2088	October 2024	First publication
	May 2025	Renaming of external funds in consideration of the ESMA Guidelines of August 21, 2024, on the use of environmental, social, governance, or sustainability-related terms in fund names
	June 2025	Update of the investment options list
	September 2025	Update of the investment options list
	March 2026	Update of the investment options list