

BEST PRACTICE HONOURS AWARD: 2014

PRI SIGNATORY: YES (2010)

## ESG TEAM



**Filipe DOS SANTOS**  
Director of Fund Administration.

**Jacques PANCRAZI**  
Managing Partner.



**Contact:** jacques.pancrazi@qualium-invest.com  
**Phone:** +33 (0)1 81 80 47 43

**Contact:** filipe.dossantos@qualium-invest.com  
**Phone:** +33 (0)1 81 80 47 37

ASSETS UNDER MANAGEMENT

€1Bn

## AREAS OF EXPERTISE

- LBO

## ESG DUE DILIGENCES DURING THE INVESTMENT PROCESS

- ESG Due Diligences are systematically conducted, with the support of external specialist if necessary.
- Example(s) of due diligence(s) carried out by an external expert over the period:
  - IMV Technologies (2014)
  - Poult (2014)

## ESG SUPPORT TO PORTFOLIO COMPANIES

- Each year:
  - An annual ESG questionnaire is sent to portfolio companies, covering LP's questions and Qualium Investissement additional questions. This reporting serves as basis to report on Fund's ESG performances to LP's.
  - Action plans are discussed with the management. They can include ESG aspects, depending on the areas for improvement identified during due diligence phase of each acquired company. Action plans are discussed during Board meetings.

## ESG VENDOR DUE DILIGENCES

- Progress made by the portfolio company on the ESG aspects can be valued during the exit process.

## QUALITATIVE DESCRIPTION OF THE ESG STRATEGY

- Qualium Investissement considers Responsible Investment principles as an opportunity to support responsible growth and help build stronger over the long term. Each measures come from our expertise on the subject, allowing the team to improve their practices and follow-up on ESG.
- For Qualium Fund's portfolio, post-closing action plans includes ESG aspects. ESG plans are adapted to each company depending on its activity and background.
- The actions realised on ESG aspects are communicated to the LPs throughout the annual reporting of the fund.

