FLASH NOTE

14.10.2022

Better understanding your attitude towards responsible investment

Published
October 14, 2022

Length
1 minute(s) read

Since August 2022, companies that provide investment advisory, management services to third parties, or distribute life insurance policies have been required to assess their clients' interest in, and **attitude towards, responsible investment**.

The purpose of this new requirement, which is primarily derived from the latest version of the Markets in Financial Instruments Directive (or MiFID II) [1] , is to **enhance protection** of investors, ensure better understanding of their aims, and **offer solutions** tailored to their objectives.

As such, we have compiled a questionnaire to **record our clients' preferences**, especially with regard to…

The minimum share of their investments that is to be aligned with the European Taxonomy[2];
Taking the principal adverse impacts of their investment choices into account;
The minimum share that they wish to dedicate to sustainable investments.

[1] MiFID II: Markets in Financial Instruments Directive

[2] The European Taxonomy establishes a list of economic activities that meet the performance criteria set in relation to the environment

Learn more about responsible investment at Carmignac

Click here

Important legal information