SFDR AT A GLANCE

GOALS OF SFDR

01
The regulation aims to redirect capital flows towards sustainable investments, facilitating sustainable and inclusive economic growth.
REORIENTING CAPITAL FLOWS

02
SFDR seeks to address financial risks stemming from climate change, resource depletion, environmental degradation, and social issues.
MANAGING FINANCIAL RISKS

03
It promotes transparency and long-term thinking in financial and economic activities, aligning them with sustainability goals.
FOSTERING TRANSPARENCY

WHO IS AFFECTED?

All financial market participants and financial advisors within the European Union.

Financial entities based outside the EU that market their products to EU clients.

This includes banks, asset managers, insurers, reinsurers, and a wide range of investment products, such as alternative investment funds (AIFs), undertakings in collective investment in transferable securities (UCITs), and insurance-based investments.

DEMYSTIFYING ARTICLES 6,8 & 9

Sustainability Requirements →

Article 6
- No ESG integration in the product
- Must integrate and declare sustainability risks.

Article 8
- Any product that has a sustainable investment objective.
- Must do no significant harm
- Must integrate and declare sustainability risks.

Article 9
- Any product that promotes environmental or social characteristics.
- Must actively contribute to one of the six Taxonomy objectives.
- Must do no significant harm.
- Must integrate and declare sustainability risks.

Level of detail in disclosure →

TIMEFRAME

First Reference Period
Mar 10, 2021 - Dec 31, 2021

Mar 10, 2021: Earliest date to start considering principle adverse impacts
Jun 30, 2021: Latest date the reference period must begin

Third Reference Period
Jan 1, 2023 - Dec 31, 2023

Jun 30, 2023: Details of the assesment of principal adverse sustainability impacts for the first reference period with PAI.

2021   2022   2023   2024

Second Reference Period (incl. PAI)
Jan 1, 2022 - Dec 31, 2022

Realisation
Jan 1, 2024 - ongoing

Jun 30, 2024: Completing Disclosure with a historical, year-on-year comparison

VENIONAIRE CAPITAL