

# SFDR Fund Positioning Strategy

Navigate sustainable finance  
with SFDR compliance

V1.0



**evoraglobal.com**





## What Is SFDR?

The **Sustainable Finance Disclosure Regulation** (SFDR) is legislation reshaping investment funds. It mandates transparency and disclosure of sustainability factors.

An **SFDR Fund Positioning Strategy** is crucial for regulatory compliance, market differentiation, and meeting investor expectations. It serves as a roadmap communicating your fund's commitment to sustainability, risk management, and improved market access.

Compliance with SFDR Articles 8 or 9 also distinguishes your fund's commitment to sustainable finance. **Article 8** focuses on promoting environmental or social characteristics, whereas **Article 9** centres on funds with a sustainable investment objective. Aligning with these articles enhances transparency, builds trust, and meets evolving market expectations.







## Phase 1

# Developing Your SFDR Strategy

Our Sustainability Finance team meticulously defines the scope, timeline and key milestones, initial requests for information, data sharing methods, and expected outcomes for your **SFDR Fund Positioning Strategy**.

Key considerations include your fund's launch status, geography, structure, pipeline, existing sustainability features, data practices, and due diligence processes.

Subsequently, we kick-start our two-part **SFDR workshop**. The first session explores SFDR requirements, offering valuable insights into its regulatory context. The second session transitions to a collaborative forum, constructing a personalised SFDR Fund Positioning Strategy aligned with your fund's specific goals.

Leveraging these insights, we craft a tailored **SFDR roadmap** based on your fund's unique requirements, along with recommendations for effective implementation.





## Phase 2

# Implementing Your SFDR Strategy

Our team refines Phase 1 guidance to cement your SFDR Strategy. This formalises your sustainability commitments, environmental and/or social characteristics, performance indicators, and your fund's investment strategy for **Article 8**.

We collaboratively develop integration tools, including a **Sustainability Action Plan** for real estate equity funds or a **Debt Sustainability Questionnaire** for real estate debt funds.

We summarise the SFDR Strategy for inclusion in your **Private Placement Memorandum** and create a **Pre-contract Disclosure Template**. This offers transparent and standardised information for regulatory compliance and informed decision-making by investors, presented to your legal team for review.

We create an internal **Procedure Guide**, outlining how to operationalise your fund's SFDR Strategy, with designated responsibilities and reporting requirements.

This end-to-end approach ensures SFDR compliance and equips your fund with robust internal processes and documentation.







## How Can Your SFDR Strategy Unlock Prospects?

The **SFDR Strategy**, with its emphasis on transparent disclosure and sustainable commitments, unlocks new opportunities for your fund. By aligning with these regulations, your fund gains access to a growing market of investors seeking sustainable and responsible investment options.

The commitment to sustainability principles enhances your fund's appeal, fostering trust, attracting conscientious investors, and positioning it for long-term success in an evolving financial landscape.

Many EU institutional investors now view **Article 8** as a baseline requirement for new investment opportunities. Simultaneously, some are opting for more ambitious **Article 9** products in their capital allocation. Meanwhile, capital is decreasing for **Article 6** funds without sustainability commitments.







## EVORA: Your Partner for SFDR Strategy

At EVORA, our Sustainability Finance team empowers your funds for success within the SFDR framework, attracting valuable EU investments.

Our comprehensive approach includes educational workshops for a deep understanding of SFDR regulations, collaborative development of a tailored **SFDR Strategy** integrating sustainability factors, and expert handling of regulatory documents.

To learn more, please read our Product Note on **OUR SOLUTION FOR SFDR REPORTING**.







# Trust EVORA Global for Sustainable Assets

**We go beyond consultancy, serving as your trusted partner for sustainable real asset investments.**

With our unparalleled **Collaborative Expertise**, we provide actionable insights that empower your real asset community to thrive in sustainable investment.

Our proven expertise in strategic consulting, climate resilience, net zero, sustainable finance, infrastructure, reporting, and social wellbeing ensure your investments are aligned with environmental, social, and governance goals for a secure ROI.

# Driven by Collaborative Expertise

## STRATEGY

Driving value and impact with sustainable ESG strategies

## TECHNOLOGY

Streamlining operations and insights with advanced real asset technology, **SIERA**



## ADVISORY

Navigating sustainable solutions with expert real asset advice



## Our Mission

To establish sustainability and carbon as foundational factors for investment decisions.

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## Our Purpose

To accelerate the adoption of real asset sustainability and enhance the wellbeing of the planet and its people.

## Our Clients

**250+**  
CLIENTS

**45,000**  
ASSETS

**\$880 billion**  
AUM

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**Together with EVORA Global Germany, we've achieved remarkable success in developing the MOMENI ESG strategy 2022, exemplifying our commitment to sustainability through excellence.”**

**Tristan Holtkamp**  
Head of ESG  
**MOMENI Group**



## Contact Us

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