

Investment Group

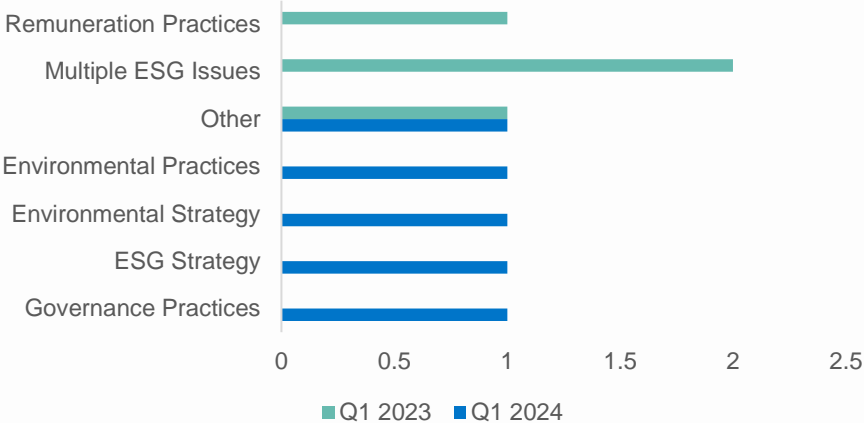


# Sanlam Investments Engagements

Q1 2024

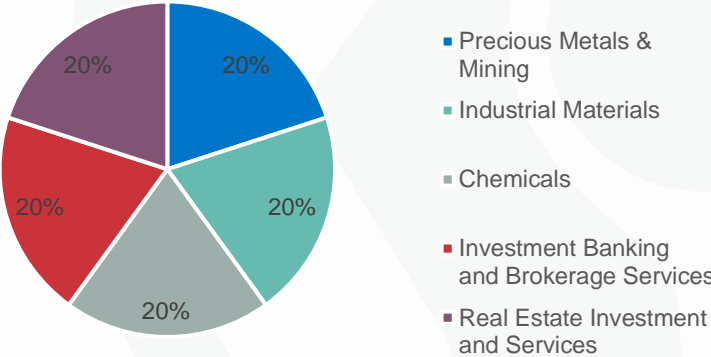
# Q1 2024 SI In-House Engagements

### SI In-house Engagements: Q1 2023 vs Q1 2024



Q1 2024: 5 Engagements

### SI In-house Engagements: Q1 2024 Sector



# SI In-House Engagements (Examples)

## Implats (“IMP”)

**Sector:** Precious Metals and Mining

**Date:** 17 January 2024

**Engagement dialogue:** Governance prac

**Primary dialogue:** Impala Rustenburg’s 11 Shaft operation.

**Summary:**

- Details pertaining to their basic understanding of what happened at the 11 Shaft

**Progress:** Not Applicable



## Sappi (“SAP”)

**Sector:** Materials

**Date:** 28 February 2024

**Engagement dialogue:** ESG Roadshow

**Primary dialogue:** Sustainability-linked bond issuance.

**Summary:**

Direct engagement discussing the following:

- Early issuance of sustainability-linked bond to the market.
- Plans to achieve Thrive 2025 strategy and realise sustainability targets.
- **Progress:** Not Applicable



## Sasol (“SOL”)

**Sector:** Chemicals

**Date:** 23 January 2024

**Engagement dialogue:** ESG Roadshow

**Primary dialogue:** Environmental strategy

**Summary:**

Direct engagement discussing the following:

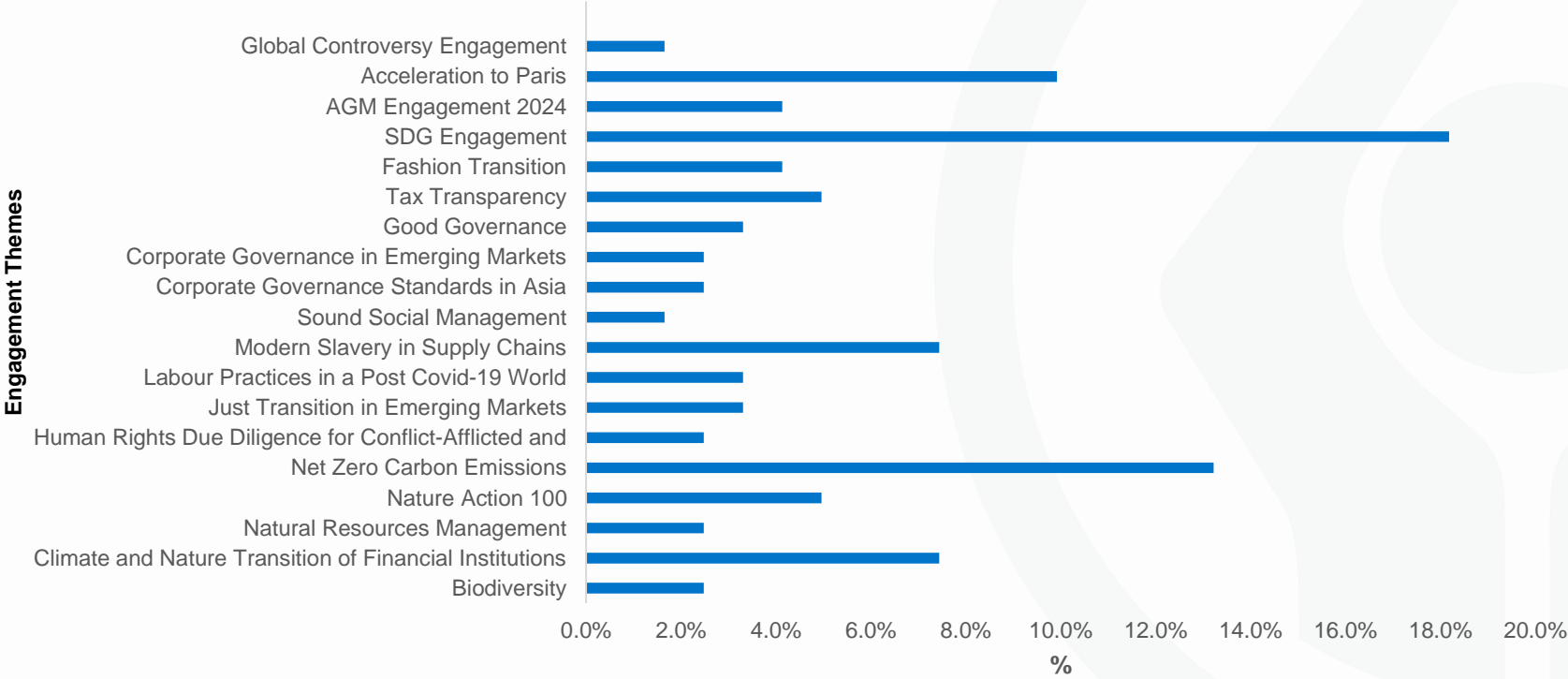
- Sasol’s request to measure Sulphur dioxide emissions from the Secunda plant by rate or load instead of concentration.
- Key discussions on clear strategies to reduce environmental impact and align with ESG standards.
- Provided update on plans to reduce GHG emissions by 30% and transition to gas at the Secunda plant.
- Investee communicated plans to ramp up decarbonization expenditure from 2025 onwards
- **Progress:** Not Applicable



# Q1 2024 Robeco-led Engagements

Q1 2024: 121 Engagements

### Q1 2024 Robeco-led Engagements - Themes

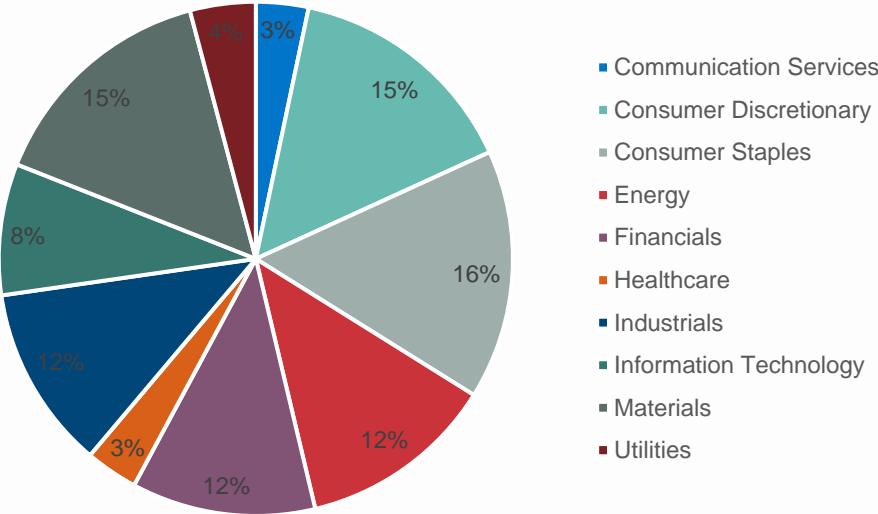


Source: Robeco

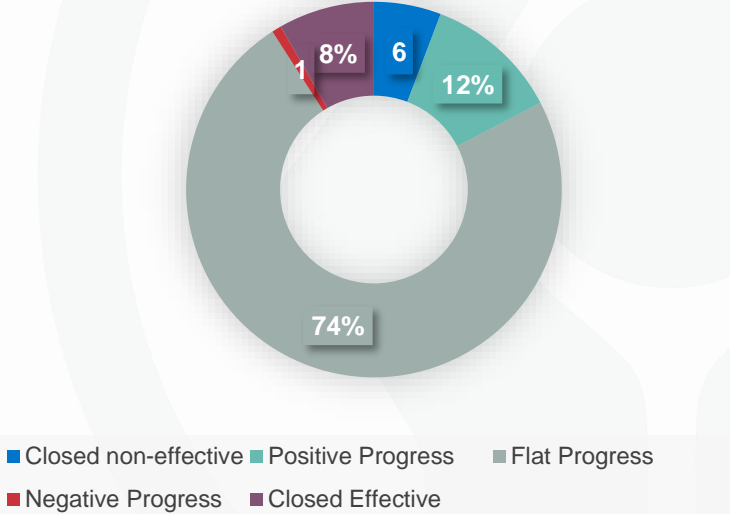
# Q1 2024 Robeco-led Engagements

Q1 2024: 121 Engagements

Q1 2024 Robeco-led Engagements - Sector



Q1 2024 Robeco-led Engagements - Progress





**thank you** 