

# Editorial Policy

This report focuses on the ESG (Environmental, Social and Governance) initiatives of the SuMi TRUST Group, which strives for the balanced creation of both social value and economic value. The Group has been publishing integrated reports with investors as the primary reader since 2017, and this report provides comprehensive disclosure to investors and non-investor stakeholders seeking more detailed ESG information.

This report was prepared based on the Common Metrics presented in the white paper “Measuring Stakeholder Capitalism-Toward Common Metrics and Consistent Reporting of Sustainable Value Creation,” which was compiled by the four major global accounting firms based on recommendations from the World Economic Forum’s International Business Council. Moreover, included in the appendix is a comparison table featuring the relevant Common Metrics, accounting indicators for the financial sector from the SASB (Sustainability Accounting Standards Board) that have been passed on to the ISSB (International Sustainability Standards Board), and the international non-financial information

disclosure standards from the GRI (Global Reporting Initiative). Also included is annually disclosed information as stipulated by the Principles for Responsible Banking (PRB), to which we became a signatory in September 2019.

## Scope of This Report

Reports the initiatives of the SuMi TRUST Group (SuMi TRUST Holdings, SuMi TRUST Bank, Sumitomo Mitsui Trust Asset Management, and Nikko Asset Management. Major initiatives related to other Group companies are also included.)

## Target Readers

All stakeholders, including customers, shareholders and investors, employees, business partners, local communities, NPOs, governments, international institutions, etc.

## Period Covered by This Report

As of the end of January 2023 (some information from February 2023 and beyond is also included)

## Sustainability Information Disclosure Outline

In addition to this report and the Integrated Report, the Group discloses a variety of information on sustainability. First, there are separately published versions spun off from this report, which are the TCFD (Task Force on Climate-related Financial Disclosures) Report (formerly the “Climate Change Report”), the Natural Capital Report, and the ESG Real Estate (formerly the “Environmentally Friendly Property Report”). In addition, SuMi TRUST Bank publishes two types of digest reports for seniors (“Considering the Problems of Dementia” and “Senior-Generation Housing”) every other year, and publishes the SuMi TRUST With You Social Contribution Report every quarter. Meanwhile, asset management business Sumitomo Mitsui Trust Asset Management publishes the Stewardship Report and Nikko AM publishes the Sustainability Report annually to disclose details of their respective ESG investment initiatives. Our website carries extensive information on the Sustainability activities that Sumitomo Mitsui Trust Group does not cover in this report.



Specifically, the website provides more detailed information on our initiatives related to issues such as successful aging and support for the environment and living creatures.

Sustainability in Sumitomo Mitsui Trust Group  
<https://www.smth.jp/en/csr/index.html>

The quarterly pamphlet SuMi TRUST With You is a regular report published four times a year by SuMi TRUST Bank for our clients nationwide. It covers topics of high interest and concern for the elderly, trending topics, and noteworthy sustainability initiatives.

