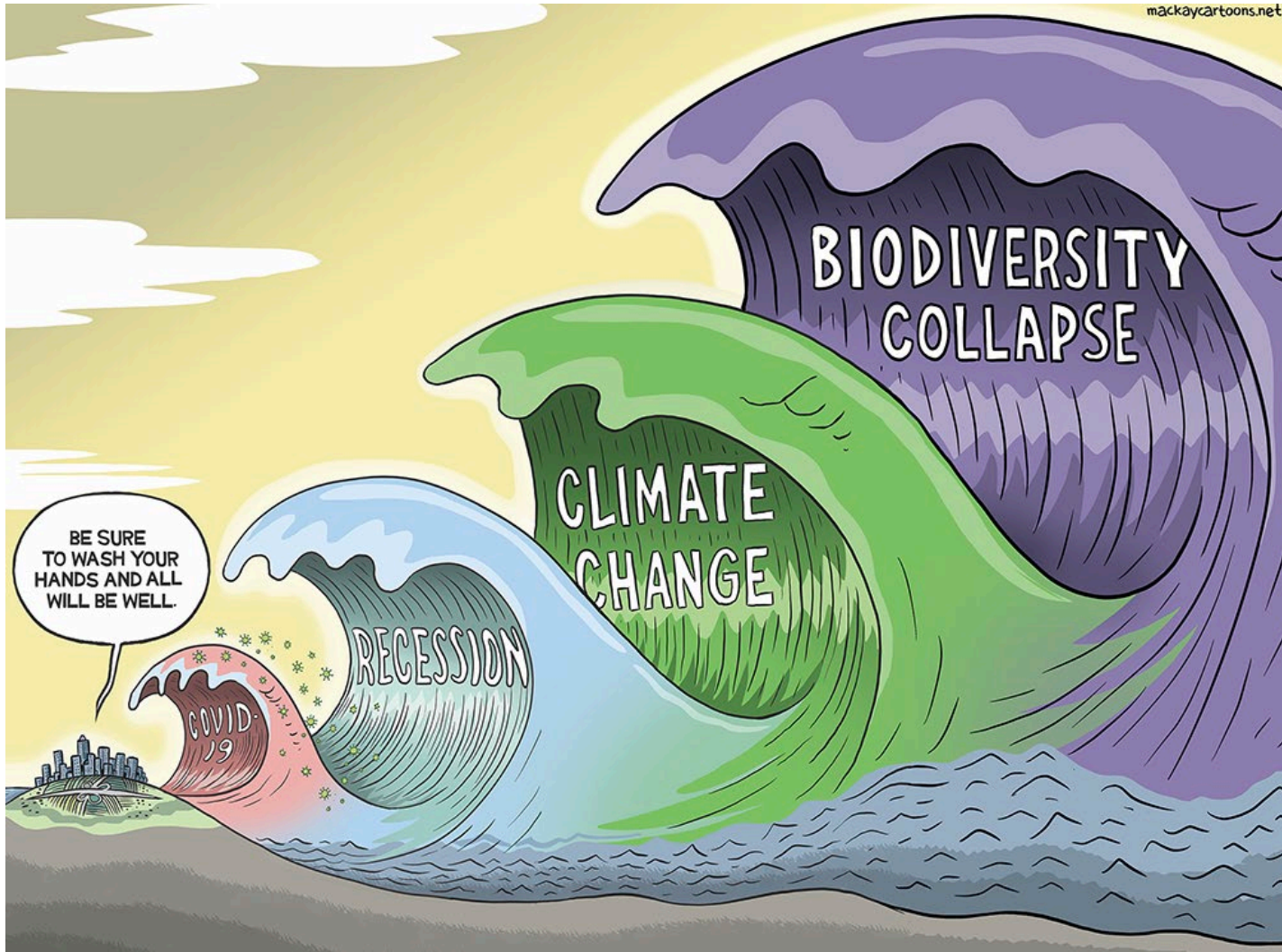


IMPACT INVESTING
The Climate Emergency

18TH OCTOBER 2021

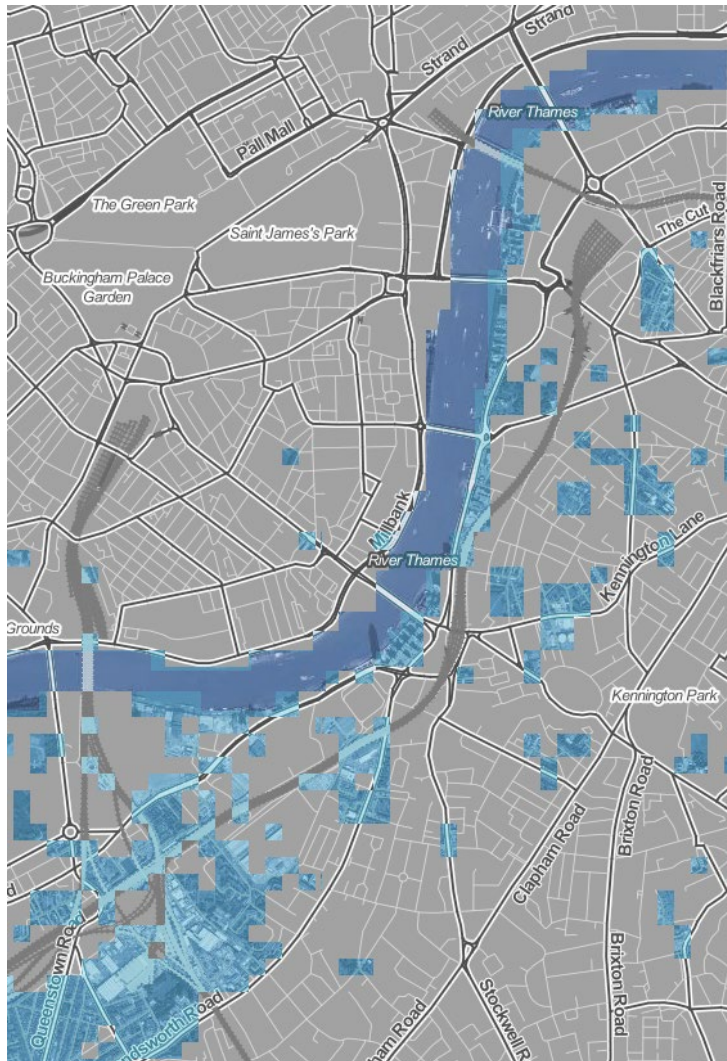


WE FACE SUCCESSIVE TSUNAMIS

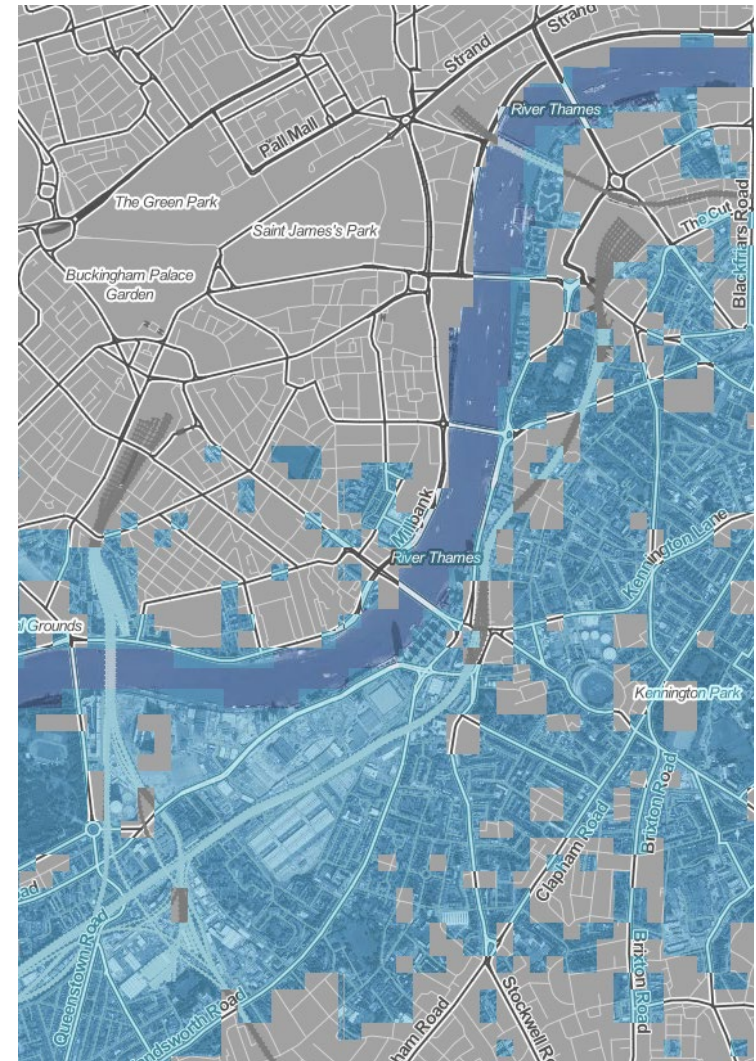


IMPACT OF RISING SEA LEVELS ON LONDON

+1.5°C Warming – Sustainable Development Scenario

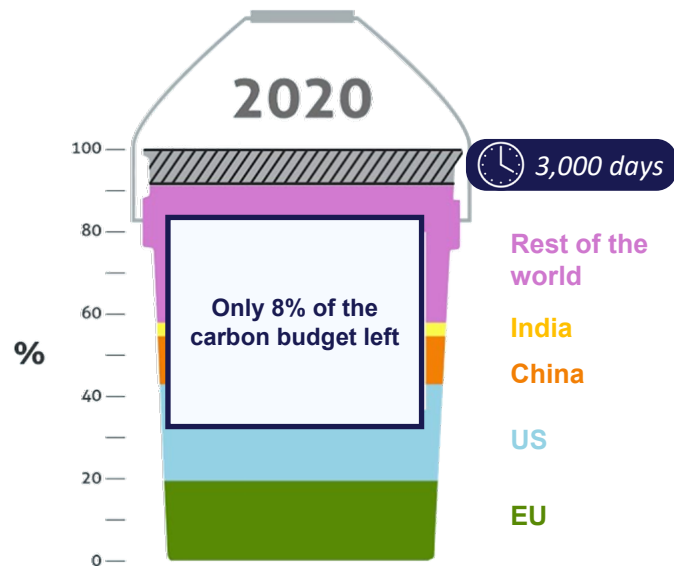


+4°C Warming – Current Policies Scenario



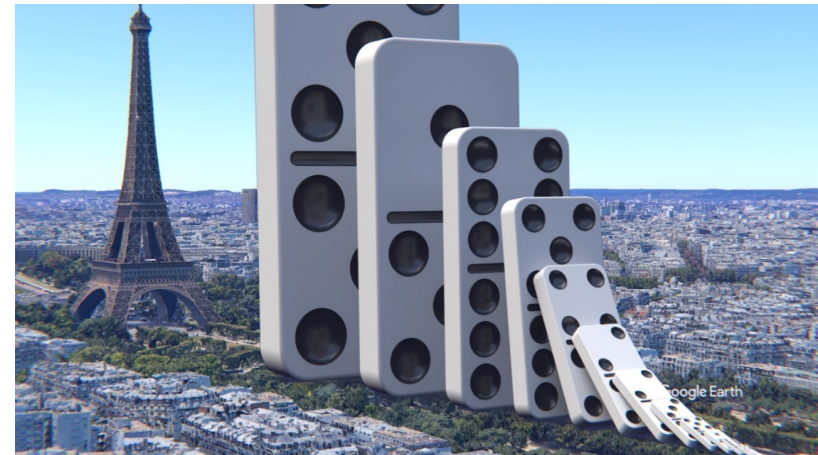
BUSINESS AS USUAL IS NOT AN OPTION

The carbon budget for +1.5 degrees



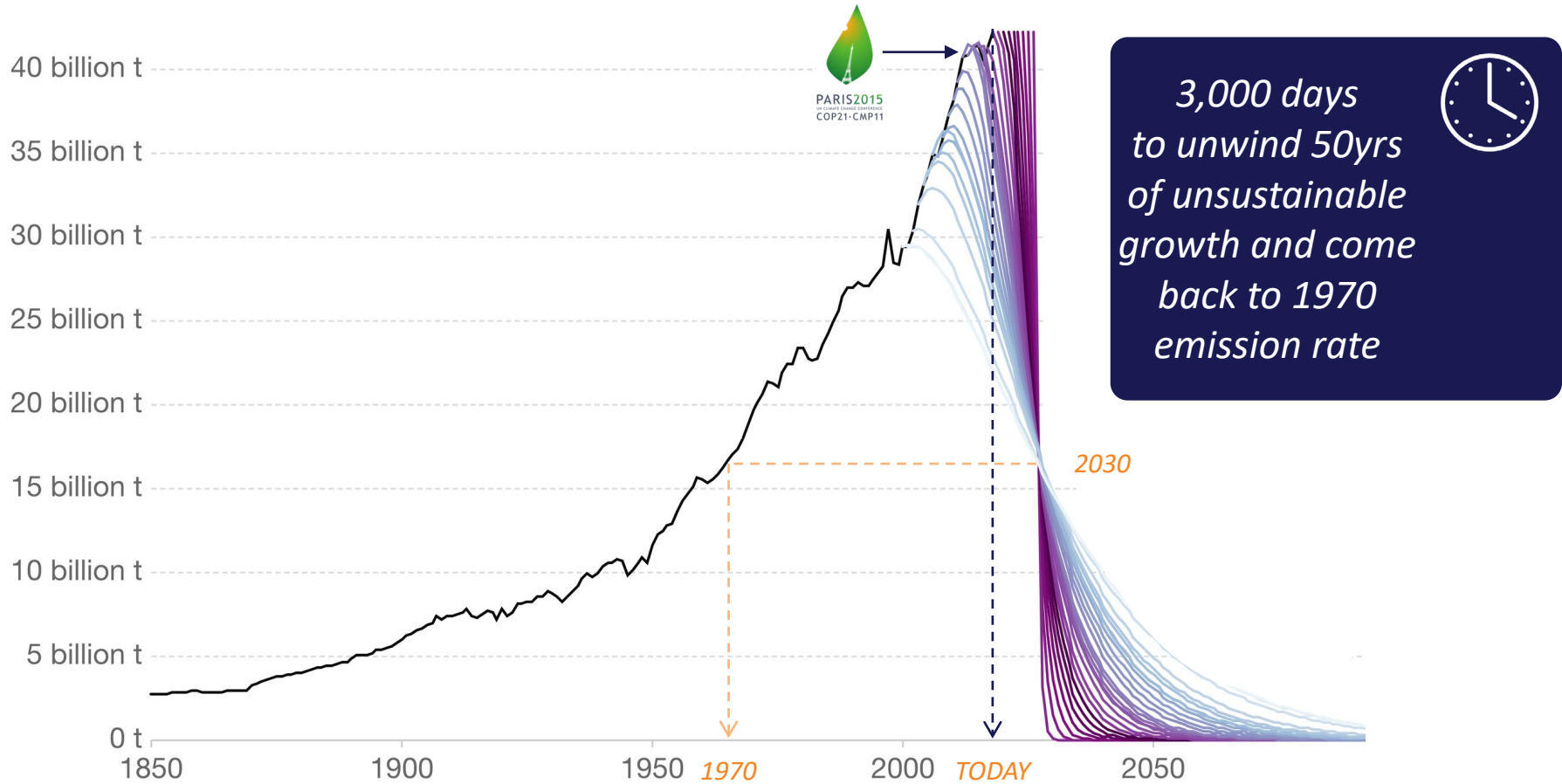
We have 3,000 days to act

To remain within *planetary boundaries* and avoid reaching a *tipping point*

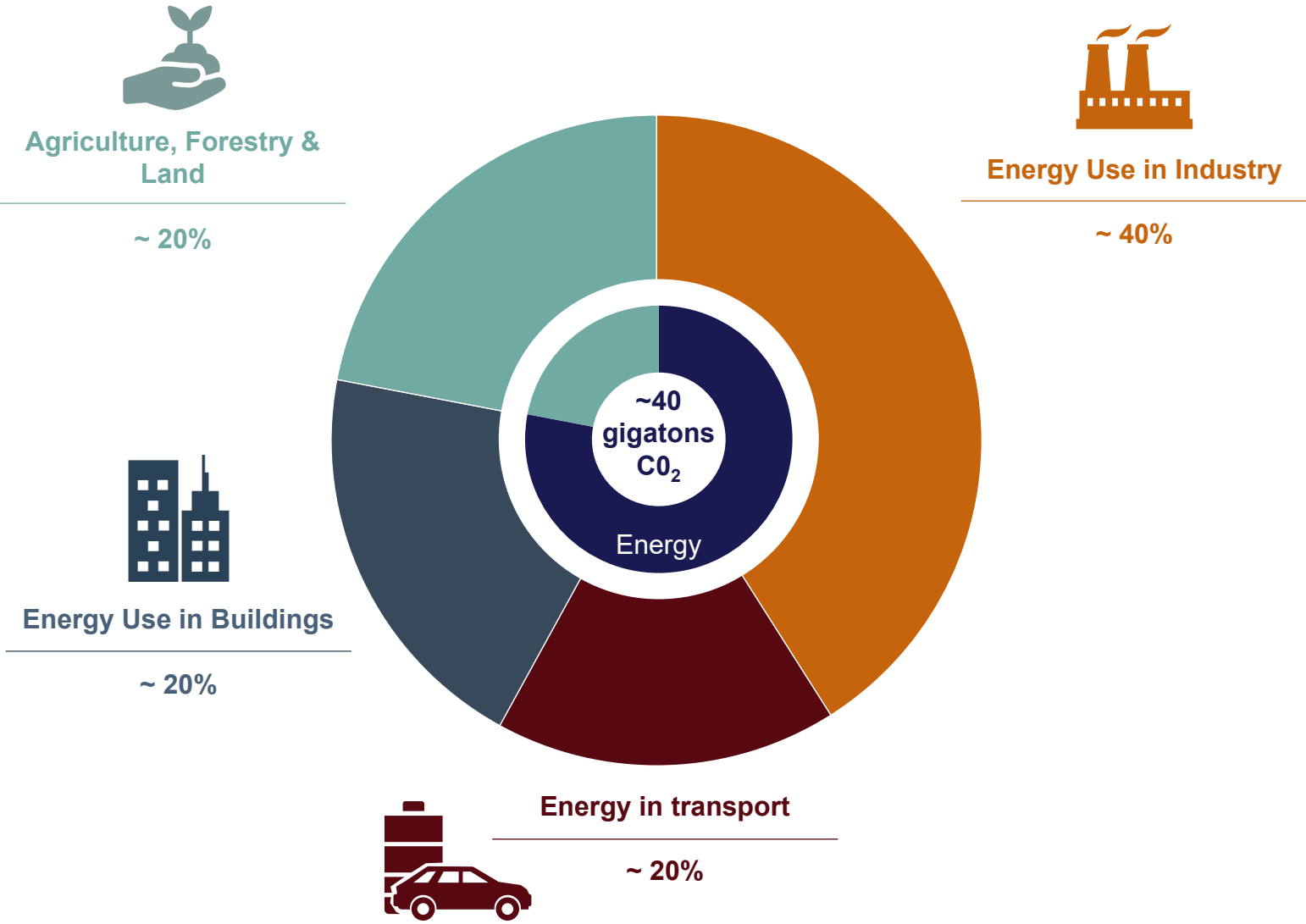


3,000 DAYS TO HALVE EMISSIONS

CO₂ emissions reduction target

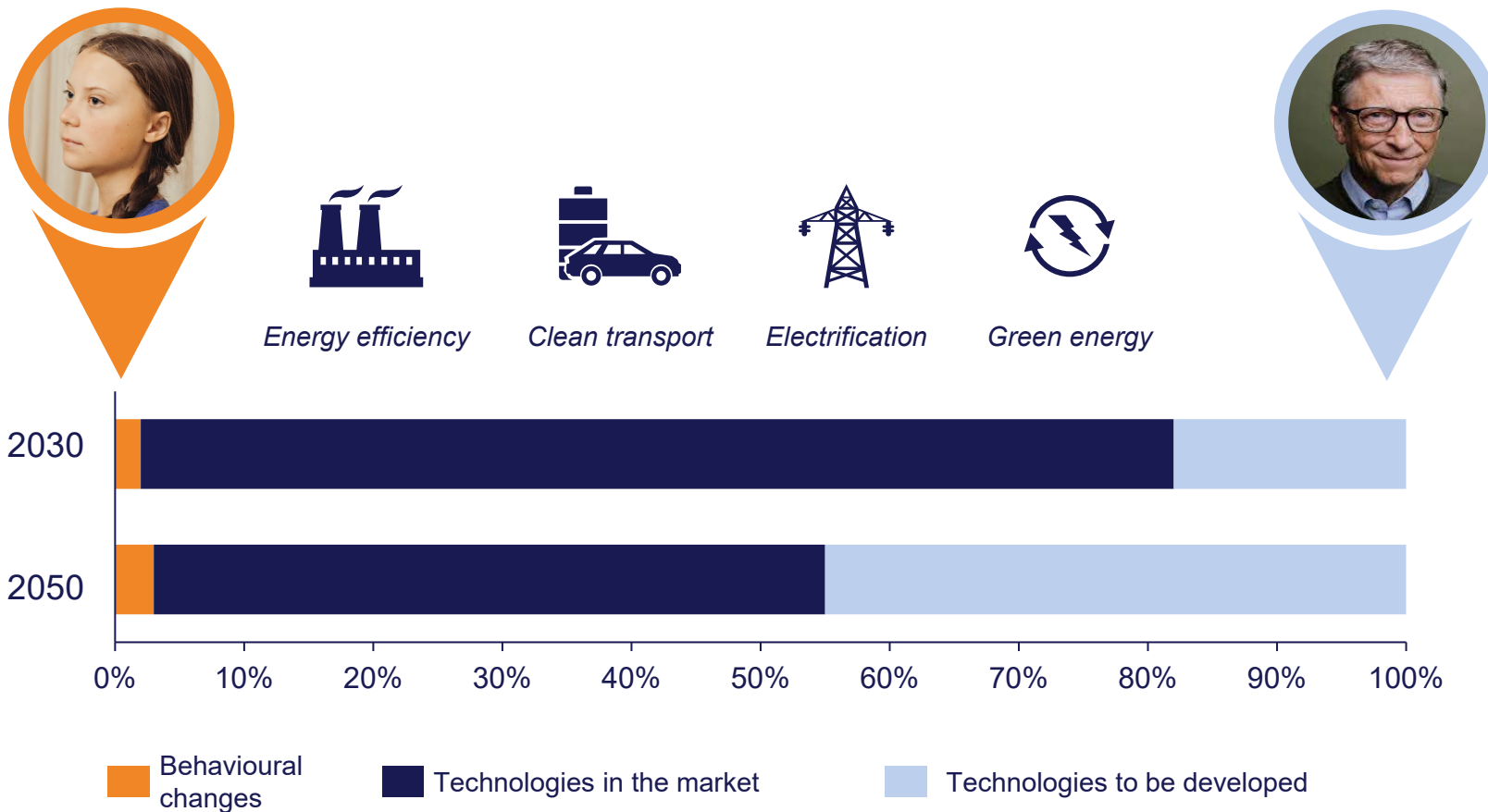


HALVING CO₂ EMISSIONS BY 2030



HALVING CO2 EMISSIONS BY 2030: INTERNATIONAL ENERGY AGENCY PRIORITY ACTIONS

Annual CO₂ emissions savings in the IAE net zero pathway



HALVING CO2 EMISSIONS BY 2030: TIKEHAU SET-UP

+33 PEOPLE

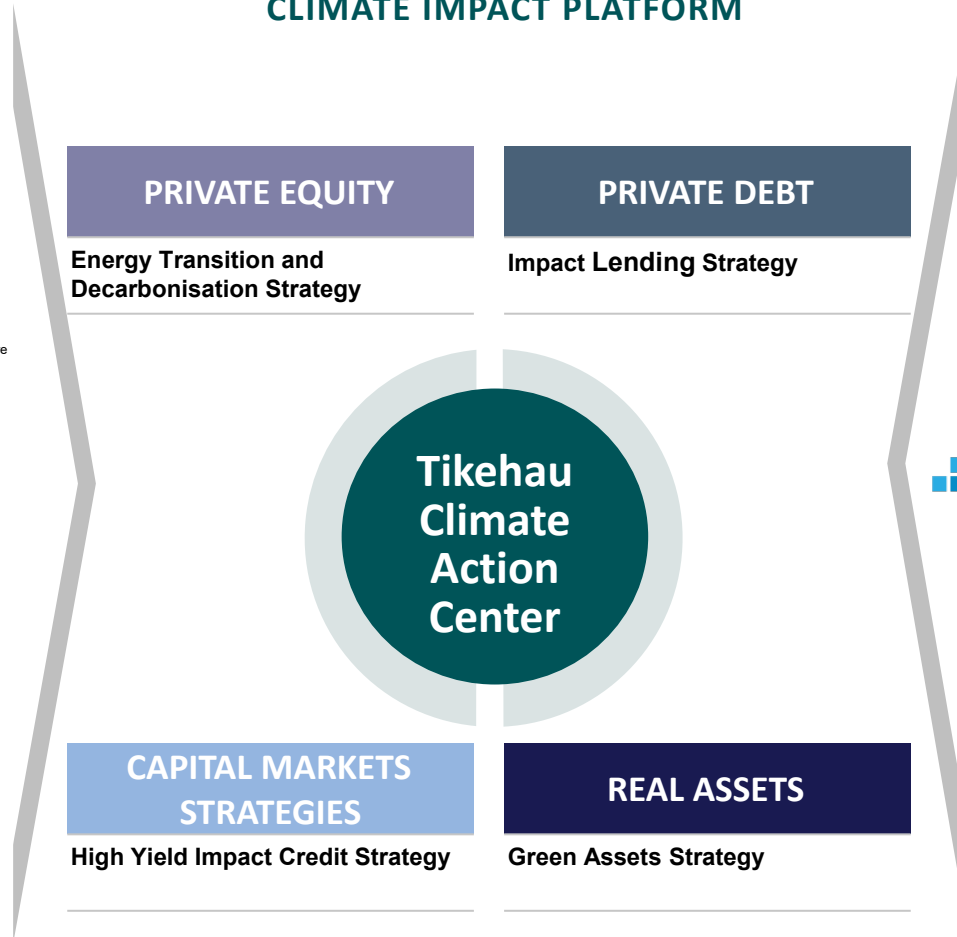
CLIMATE & ESG EXPERTS

 Pierre Abadie Head of Climate	 Nathalia Millan ESG Lead for PE & Infrastructure
 Laure Villepelet Head of ESG	 Vincent Lemaitre ESG Lead for Private Debt

EXAMPLE OF SENIOR ADVISORS & OPERATING PARTNERS

 Jean-Marc Gales	 Ivan Marten
 Miriam Maes	 Andrew Pidden
 Vincent Favier	 Joost Van Meerbeeck

CLIMATE IMPACT PLATFORM



SCIENTIFIC REPORTS & RECOGNISED FRAMEWORKS

Logos of scientific reports and frameworks:

- ipcc (Intergovernmental Panel on Climate Change)
- iea (International Energy Agency)
- PRI (Principles for Responsible Investment)
- EU TAXONOMY
- ONE PLANET SUMMIT
- THE NET-ZERO ASSET OWNER ALLIANCE
- RACE TO ZERO



TIKEHAU CAPITAL'S IMPACT APPROACH

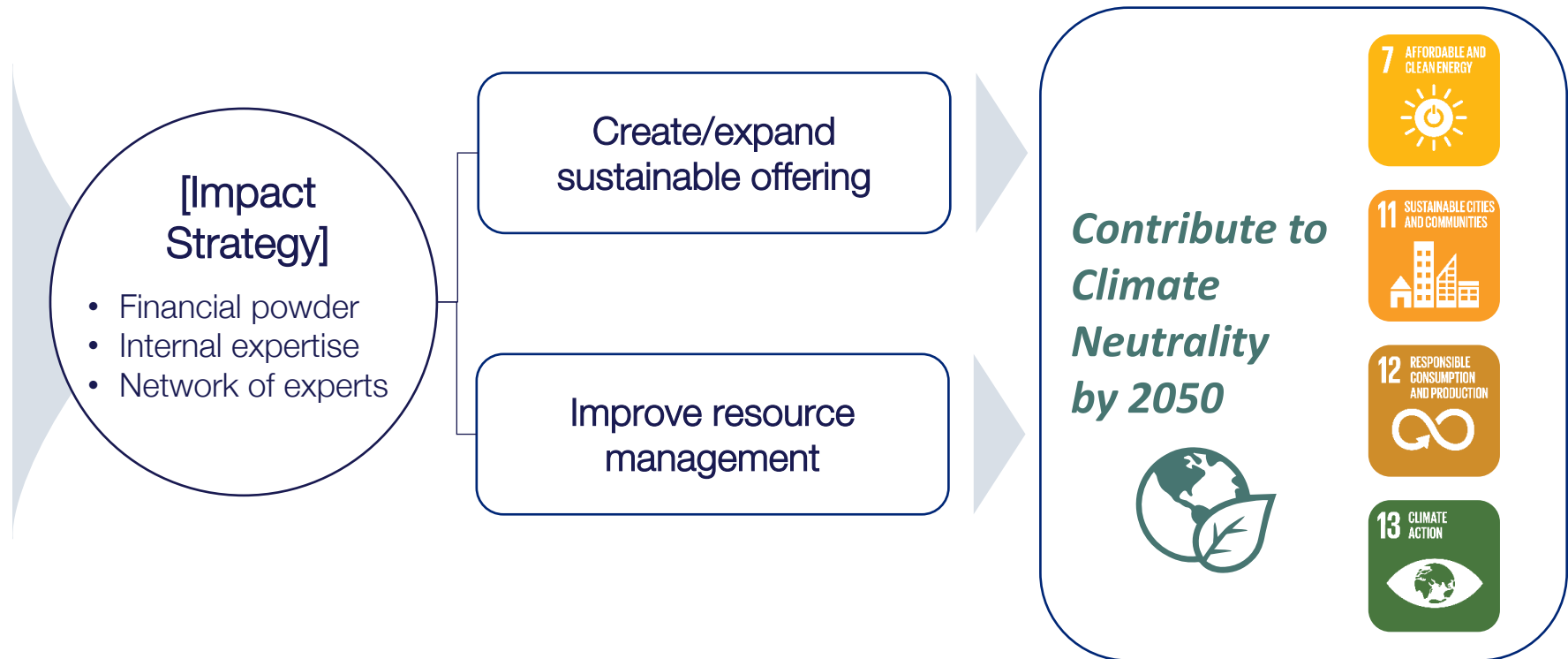


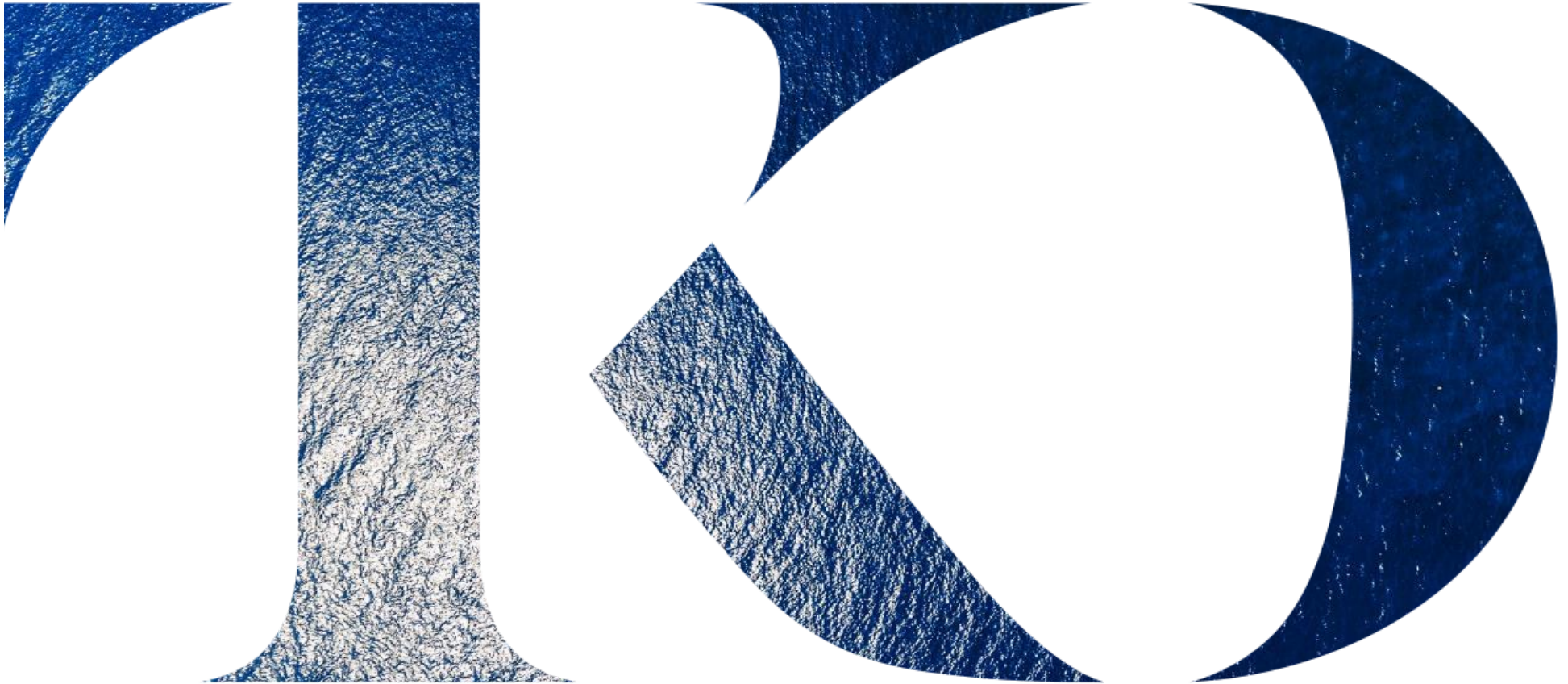
EXAMPLE OF THEORY OF CHANGE

We finance and engage with companies ...

...which have the potential to contribute ...

...to a transition toward a net zero carbon economy





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