Alvis: The First Gate in Our Investment Process

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Alvis is Storebrand Global Solutions' proprietary thematic whitelist and the foundation of our investment process. Before any financial analysis is conducted, every company must pass through Alvis to demonstrate genuine alignment with sustainable development themes and real-world impact outcomes. The framework ensures that sustainability considerations are embedded at the very beginning of the investment decision-making process, rather than applied as a secondary filter.

Starting from a global universe of approximately 40,000 listed companies, Alvis combines systematic sustainability data with in-depth qualitative research to identify businesses that provide meaningful solutions to environmental and social challenges. The objective is not simply to find companies that generate revenue from activities classified as sustainable, but to identify those whose products and services make a credible, scalable, and measurable contribution to the Sustainable Development Goals (SDGs).

The process draws on a broad set of structured datasets, including green revenue classifications, controversy screening, carbon and resource intensity metrics, net impact assessments, gender equality indicators, climate lobbying analysis, and conflict-risk screening. These datasets provide a consistent and comparable basis for assessing thousands of companies globally.

However, data alone is rarely sufficient. Alvis therefore incorporates extensive qualitative research from academic institutions, NGOs, intergovernmental organizations, company disclosures, engagement activity, news flow, and portfolio manager analysis. This additional layer is essential for identifying integrity concerns, emerging risks, supply chain issues, or business model weaknesses that may not be captured in standard sustainability datasets.

Companies identified through this research process are assessed against the Alvis scorecard. To qualify, a company must derive at least 25% of its revenues from SDG-linked solutions and pass a series of "Do No Significant Harm" integrity checks. Beyond revenue alignment, companies are evaluated on the credibility of their impact, the scalability of their solutions, and their ability to deliver long-term positive outcomes. They are subsequently classified as either pure-play solution providers or diversified companies with significant exposure to solution-driven activities.

The result is a focused whitelist of more than 700 companies that forms the investable universe for Storebrand Global Solutions strategies. Companies are either approved as potential portfolio holdings, placed on a watchlist for continued monitoring, or rejected. All decisions are documented and maintained through a full audit trail, which is reviewed annually as part of the governance process.

A key differentiator of Alvis is its willingness to challenge conventional sustainability classifications. Revenue alignment alone is not considered sufficient evidence of impact. For example, companies with clean-energy business segments may still be excluded if they maintain significant fossil fuel exposure. Technologies with military-adjacent applications can fail the integrity assessment despite apparent societal benefits. Similarly, concerns related to supply chains, biodiversity, human rights, accessibility, or business model sustainability can outweigh a positive headline classification.

This approach reflects a core principle of Alvis: sustainable investing requires an assessment of impact, integrity, and scalability in equal measure. By combining data-driven screening with rigorous qualitative analysis, Alvis seeks to ensure that every company entering our investment universe represents a credible and durable solution to global sustainability challenges.