

Inrate's Best-in-Service Approach for Nest Sammelstiftung





Benchmarking sustainability leadership through Best-in-Service precision

Nest Sammelstiftung, one of Switzerland's leading ecological and ethical pension funds and a client for 24 years, has placed sustainability at the centre of its investment strategy. Nest sought a practical solution that would allow it to benchmark true sustainability leadership across industries—moving beyond traditional sectoral analyses.

Inrate enabled Nest to translate its sustainability goals into actionable investment decisions by applying its Best-in-Service benchmarking to guide sustainable and transparent capital allocation. Unlike the traditional best-in-class model which compares companies only within their respective sectors, Best-in-Service benchmarking allowed the client to evaluate companies across sectors that deliver similar services.



Through the collaboration with Inrate, Nest gained access to:

- Cross-industry benchmarking that identifies true leaders and laggards based on product/service contribution and social/environmental impact.
- A net impact-based rating system that classifies companies as Above Benchmark or Below Benchmark, guiding investment selection, engagement, and portfolio strategy.
- A forward-looking impact framework aligned with Nest's values and long-term sustainability goals.

Nest now applies the Best-in-Service benchmarking across a variety of their investment universes including Equities Switzerland (Aktien CH), Equities Global (Aktien Global), Equities Emerging (Aktien EM), Government Bonds CHF (Staatsanleihen CHF), and more.



Results:

Precision in selecting investments that excel financially and deliver societal value.

Cross-industry benchmarking to identify sustainability leaders and laggards.

Enhanced transparency and alignment in capital allocation, supporting leadership in sustainable pension fund management.
