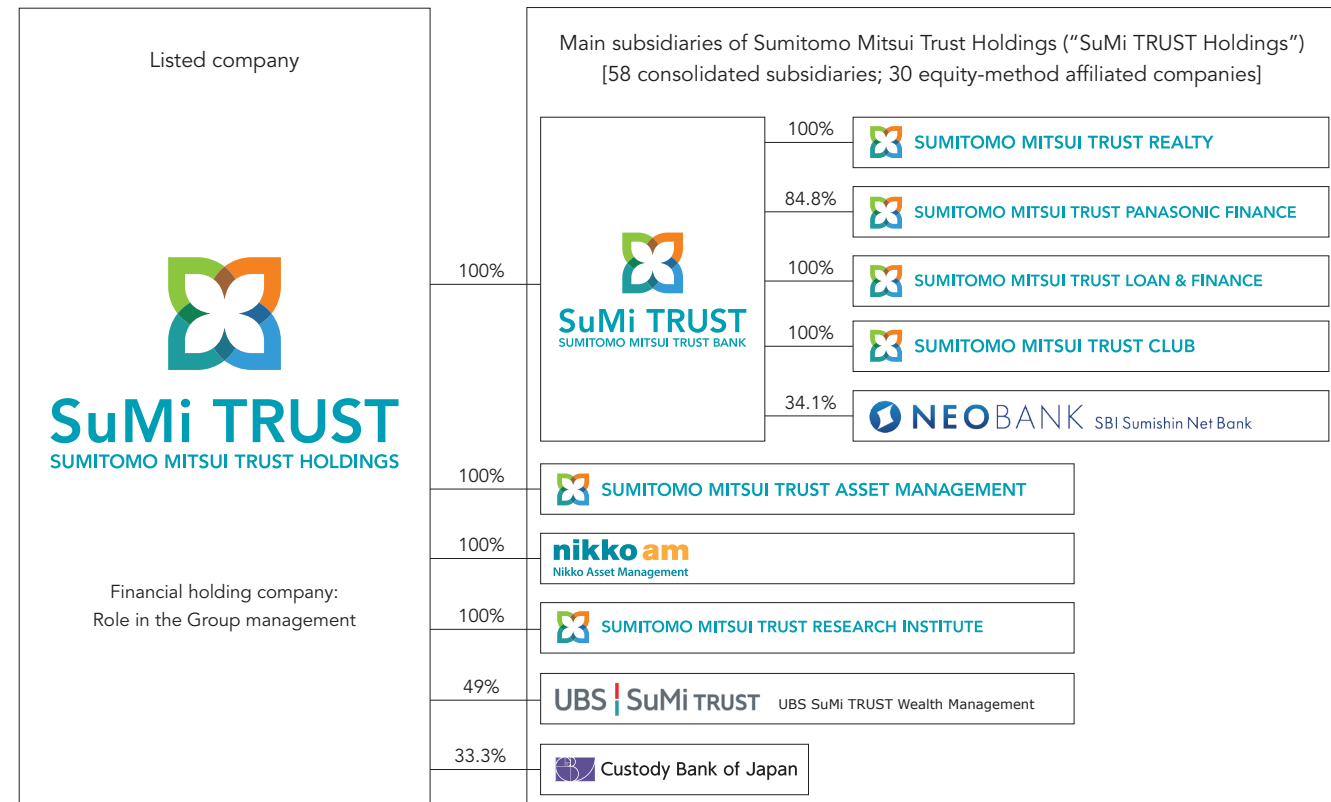


## Group information and external evaluation of SuMi TRUST Group

SuMi TRUST Group offers its clients optimal and total solutions by leveraging its comprehensive capabilities that integrate both trust and banking functions, as well as the mutual collaboration between SuMi TRUST Bank and the many group companies that specialize in banking, asset management and asset administration, real estate, and various other fields.

(as of March 31, 2023)



\*Ratio of ownership of voting rights is shown in %, including indirect ownership via subsidiaries.

## 1 Status of SuMi TRUST Group

Trust (fee) businesses	Assets under management	¥121 trn	Domestic financial institutions	No. 1
	Assets under custody*	¥256 trn	Domestic financial institutions	No. 2
	Balance of corporate pension funds	¥13 trn	Trust banks	No. 1
	Lead manager for corporate pension funds	1,279 cases	Trust banks	No. 1
	Entrusted balance of investment trusts	¥87 trn	Trust banks	No. 2
	Entrusted balance of real estate securitization	¥24 trn	Trust banks	No. 1
	Number of shareholders under administration	35.24 mn	Trust banks	No. 1
	Number of will trusts	38,640	Trust banks	No. 2
	Balance of monetary claims in trusts	¥20 trn	Trust banks	No. 1
Banking businesses	Balance of loans to corporations	¥20 trn	Domestic banks	No. 5
	Total loan balance	¥31 trn	Domestic banks	No. 5

\*Balance of trust assets (under management). Trust banks specializing in asset administration are excluded due to their large amounts of re-entrusted trust assets.







## 2 ESG assessment organizations

MSCI ESG Rating **AA**  
(as of May 2023)

Sustainalytics ESG  
Rating  
(as of October 2022)

FTSE ESG Rating **3.7**  
(as of September 2022)

### 3 Adopted indexes

<p>2023 MSCI Japan Empowering Women Index (WIN)</p> <p>2023 CONSTITUENT MSCI JAPAN EMPOWERING WOMEN INDEX (WIN)</p>	<p>2023 MSCI Japan ESG Select Leaders Index</p> <p>2023 CONSTITUENT MSCI JAPAN ESG SELECT LEADERS INDEX</p>	<p>2023 MSCI ESG Leaders Indexes</p> 	<p>FTSE 4Good Index Series</p>  <p>FTSE4Good</p>
<p>THE INCLUSION OF SuMi Trust Holdings IN ANY MSCI INDEX, AND THE USE OF MSCI LOGOS, TRADEMARKS, SERVICE MARKS OR INDEX NAMES HEREIN, DO NOT CONSTITUTE A SPONSORSHIP, ENDORSEMENT OR PROMOTION OF SuMi TRUST Holdings BY MSCI OR ANY OF ITS AFFILIATES. THE MSCI INDEXES ARE THE EXCLUSIVE PROPERTY OF MSCI. MSCI AND THE MSCI INDEX NAMES AND LOGOS ARE TRADEMARKS OR SERVICE MARKS OF MSCI OR ITS AFFILIATES.</p>			
<p>FTSE Blossom Japan Index</p>  <p>FTSE Blossom Japan Index</p>	<p>FTSE Blossom Japan Sector Relative Index</p>  <p>FTSE Blossom Japan Sector Relative Index</p>	<p>S&amp;P Carbon Efficient Index</p> 	<p>Bloomberg Gender-Equality Index 2023</p> 

#### 4 List of awards<sup>\*1</sup>

<p>Sumitomo Mitsui Trust Holdings</p>	<p>Work with Pride Gold 2022</p> 	<p>2023 Certified Health &amp; Productivity Management Outstanding Organizations Recognition Program</p> 	<p>Principles for Financial Action for the 21st Century FY2022 Best Case Example (Minister of the Environment Award)</p> 
<p>Sumitomo Mitsui Trust Bank</p>	<p>FY2022 Good Design Award*2</p>  <p><b>GOOD DESIGN AWARD 2022</b></p> <p>Work with Pride Rainbow 2022</p> 	<p>HDI-Japan Phone Support (Quality) Three Stars</p>  <p>2022 ESG Finance Awards Japan</p> 	<p>HDI-Japan Web Support Three Stars</p>  <p>9th Annual Platinum Vision Awards Grand Prize from the Economy, Trade and Industry Minister</p>  <p>プラチナ構想ネットワーク</p>

\*1 Main awards received by the Group since 2022

\*2 Received by "Smart Life Designer"