

ASIAN INFRASTRUCTURE INVESTMENT BANK

Local Currency Financing

September 2019



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As at May 1, 2019 unless otherwise stated.



- I. **OVERVIEW OF AIIB**
- II. LOCAL CURRENCY
- III. KEY FINANCIAL POLICIES
- IV. INVESTMENT OPERATIONS
- V. ENVIRONMENTAL, SOCIAL & GOVERNANCE

ABOUT AIIB

Asian Infrastructure Investment Bank

Who we are

Multilateral Development Bank (MDB) established by international treaty and headquartered in Beijing, founded to bring countries together to address **Asia's infrastructure funding gap, estimated at USD26 trillion through 2030.**¹ Our core principles are openness, transparency, independence and accountability.

Our mission

To improve economic and social development in Asia, through a focus on **sustainable infrastructure, cross-border connectivity and private capital mobilization.** Projects are supported via sovereign and non-sovereign loans, equity participations and guarantees.

Credit strength

Strong support from diversified global shareholder base. **USD100 billion capital stock** with 20% assigned to paid-in capital. Conservative risk management and financial policies. Experienced management team. **AAA/Aaa/AAA credit rating** with stable outlook. **0% risk weighting** from the BIS and EU through CRR Article 117.

The bank's foundation is built on the lessons and experience of existing Multilateral Development Banks (MDB) and the private sector. Its *modus operandi* is to be:

Lean, with a small efficient management team and highly skilled staff.

Clean, an ethical organization with zero tolerance for corruption.

Green, an institution built on respect for the environment.



¹Source: "Meeting Asia's Infrastructure Needs", ADB 2017

OVERVIEW OF SHAREHOLDING STRUCTURE

100 approved members

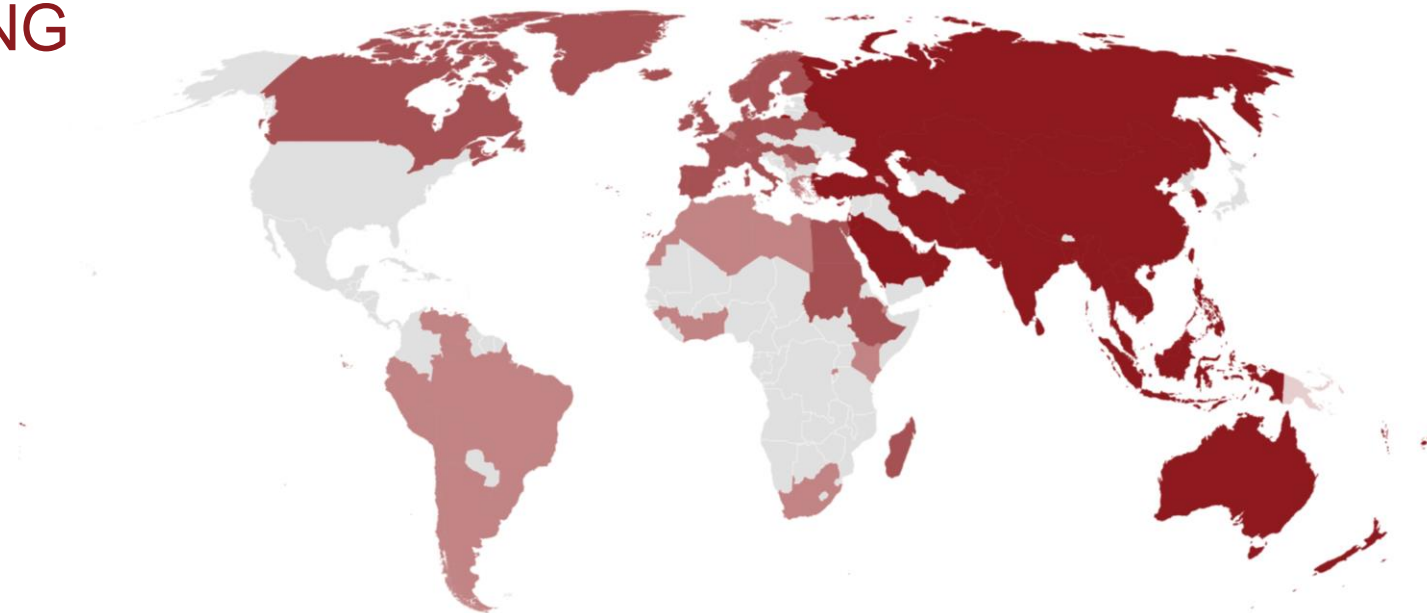


The Bank...will help to mobilize much needed additional resources from inside and outside Asia... and will complement the existing multilateral development banks.

Articles of Agreement



* Prospective founding member: These are prospective members who were original signatories to the Articles of Agreement in June 2015. Countries or territories who sought membership after that date are simply called prospective members. All prospective members have been approved by the Board of Governors but have not yet met the full requirements of membership.



Members Regional

- | | | |
|------------------|-----------------|----------------------|
| Afghanistan | Iran | Qatar |
| Australia | Israel | Russia |
| Azerbaijan | Jordan | Samoa |
| Bahrain | Kazakhstan | Saudi Arabia |
| Bangladesh | Korea | Singapore |
| Brunei | Kyrgyz Republic | Sri Lanka |
| Darussalam | Lao PDR | Tajikistan |
| Cambodia | Malaysia | Thailand |
| China | Maldives | Timor-Leste |
| Cyprus | Mongolia | Turkey |
| Fiji | Myanmar | United Arab Emirates |
| Georgia | Nepal | Uzbekistan |
| Hong Kong, China | New Zealand | Vanuatu |
| India | Oman | Vietnam |
| Indonesia | Pakistan | |
| | Philippines | |

Members Non-Regional

- | | |
|----------|----------------|
| Austria | Luxembourg |
| Belarus | Madagascar |
| Belgium | Malta |
| Canada | Netherlands |
| Denmark | Norway |
| Egypt | Poland |
| Ethiopia | Portugal |
| Finland | Romania |
| France | Spain |
| Germany | Sudan |
| Guinea | Sweden |
| Hungary | Switzerland |
| Iceland | United Kingdom |
| Ireland | |
| Italy | |

Prospective Regional

- Armenia
- Cook Islands
- Kuwait*
- Lebanon
- Papua New Guinea
- Tonga

Prospective Non-Regional

- | | |
|---------------|---------------|
| Algeria | Peru |
| Argentina | Rwanda |
| Benin | Serbia |
| Bolivia | South Africa* |
| Brazil* | Togo |
| Chile | Tunisia |
| Cote d'Ivoire | Uruguay |
| Djibouti | Venezuela |
| Ecuador | |
| Ghana | |
| Greece | |
| Kenya | |
| Libya | |
| Morocco | |

HIGH-QUALITY SHAREHOLDER BACKING

Diversified International Shareholder Base

Regional vs Non-Regional Shareholding Split¹

Regional Members	Current Shareholding	Non-Regional Members	Current Shareholding
China	30.9%	Germany	4.7%
India	8.7%	France	3.5%
Russia	6.8%	UK	3.2%
Korea	3.9%	Italy	2.7%
Australia	3.8%	Spain	1.8%
Indonesia	3.5%	Netherlands	1.1%
Turkey	2.7%	Canada	1.0%
Saudi Arabia	2.6%	Poland	0.9%
Iran	1.6%	Switzerland	0.7%
Thailand	1.5%	Egypt	0.7%
Other 34 Members	10.6%	Other 18 Members	3.1%
Total: 44 Members	76.6%	Total: 28 Members	23.4%

Ratings Status of AIIB Shareholders²

AAA:	13%
AA- or better:	28%
A- or better:	65%
BBB- or better:	90%

Preferred Creditor Treatment – In line with other MDBs, AIIB expects to benefit from preferred creditor treatment such as:

In its members it will not be required to participate in any rescheduling of national debt, Member liabilities to the AIIB, such as sovereign loans or sovereign guarantees on private sector projects, rank on par with their obligations to the IMF and other MDBs.



Note: 1. Data as of April 19, 2019;
 2. Based on ratings from S&P, Moody's and Fitch using the Basel 2/3 methodology – if three ratings available take median, if only two ratings available take lower rating. Ratings are then weighted by shareholding. Data as of April 19, 2019.

EXCEPTIONALLY SOUND BALANCE SHEET

Highly liquid, minimal leverage (as at June 30, 2019)

Assets	Liabilities & Equity
Loans ¹ USD1.685 billion	Equity ⁴ USD19.744 billion
Investments ² USD17.629 billion	Borrowings USD2.550 billion
Other ³ USD3.058 billion	Other Liabilities USD0.078 billion
TOTAL = USD22.372 billion	TOTAL = USD22.372 billion

Notes: 1. Loan investments, at amortized cost; total amount of approved financings is USD8.53 billion (excluding B loans) as at July 23, 2019.

2. Cash and cash equivalents, term deposits, and investments at fair value.

3. Paid-in capital receivables, funds deposited for cofinancing arrangements, intangible, and other assets.

4. Paid-in capital plus retained earnings minus reserve for accretion of paid-in capital receivables.



AIIB PHASES OF DEVELOPMENT

Development trajectory through to 2027

Start-Up Phase, 2016 – 2020

- Hiring expeditiously and building institutional capacity.
- Loan commitments will rise rapidly.
- Primarily sovereign lending.
- Borrowing mainly to establish the bank's name in the market and create a transparent pricing reference curve.
- Majority of paid-in capital will be fully realized¹.
- Building partnerships through cofinancing.

Growth Phase, 2021 – 2027

- As loans disburse, the balance sheet will grow rapidly.
- Borrowing will expand to meet liquidity needs and is expected to grow from several USD billion per year in the first few years to in excess of USD10 billion per year in the mid 2020s.



Note: 1. Eight members will pay their paid-in capital amount over 10 annual installments.

STRONG CREDIT FUNDAMENTALS

AIIB assigned highest rating by three agencies

Ratings	Long Term	Short Term	Outlook	Commentary	Summary Rating Rationale
Standard & Poor's	AAA	A-1+	Stable	<p>"AIIB continues making progress on delivering on its mandate by building up its operational capacity and increasing loan commitments to the region. The stand-alone credit profile for AIIB is 'aaa', reflecting our assessment of its "very strong" enterprise risk profile and "extremely strong" financial risk profile. The stable outlook reflects our expectation that, over the next 12-24 months, AIIB will continue achieving key targets as part of its start-up phase and will adhere to sound governance and risk management principles supported by an extremely strong financial profile" February 15, 2019</p>	<ul style="list-style-type: none"> ✓ Strong capital commitment from diversified sovereign shareholder base ✓ Set to have a significant impact on Asia's large infrastructure needs
Moody's	Aaa	P-1	Stable	<p>"Moody's continues to expect AIIB to maintain strong capitalization despite near-term challenges to the credit quality of some of its current investments. At the same time, shareholder support will remain steadfast as its membership and, consequently, its capital base expands beyond the levels at its founding in 2015. Overall, the rating incorporates the rating agency's assessment of AIIB's current and future creditworthiness as it continues to ramp up its operations over the next 5-10 years." March 28, 2019</p>	<ul style="list-style-type: none"> ✓ Strong governance and risk management framework ✓ Strong financial profile with very high projected liquidity position
Fitch Ratings	AAA	F1+	Stable	<p>"AIIB's 'AAA' IDR reflects its intrinsic credit strength. Based on Fitch's 10-year projections, the bank's 'excellent' capitalization and 'low' risk profile translate into a 'aa+' assessment of solvency. Liquidity is assessed at 'aaa'. AIIB's 'medium' risk business environment leads to a one-notch uplift over the lower of solvency and liquidity, to 'aaa' for the bank's intrinsic assessment." July 11, 2019</p>	<ul style="list-style-type: none"> ✓ Very high strength of member support ✓ Preferred creditor status ✓ BIS 0% RW / HQLA level 1 status



Credit ratings do not constitute investment or financial advice, and credit ratings are not recommendations to purchase, hold or sell particular securities. Credit ratings do not comment on the suitability of an investment for any particular investor. There is no assurance that any rating will remain in effect for any given period of time or that any rating will not be revised or withdrawn entirely by a rating agency in the future if, in its judgment, circumstances so warrant.

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AIIB LOCAL CURRENCY FINANCING

For Clients Local Currency Financing represents:

- *Reduction in earnings' volatility due to FX movements*
- *Decrease of debt burden in case of LCY depreciation*
- *Better credit rating of a borrower / project*
- *Possibility of borrowing in longer tenor*

For AIIB Local Currency Financing represents:

- *Flexibility to offer client's currency of choice*
- *Stronger credit for loan book*
- *Lower possibility of defaults*
- *Access to loan markets that operate in LCY only*

No currency risk for client – better asset for AIIB

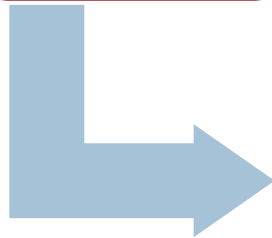
LOCAL CURRENCIES FOR 2019

India	<ul style="list-style-type: none">• Fixed Rate
Indonesia	<ul style="list-style-type: none">• Fixed Rate
Russia	<ul style="list-style-type: none">• Fixed Rate• Floating Rate
Thailand	<ul style="list-style-type: none">• Fixed Rate
Turkey	<ul style="list-style-type: none">• Fixed Rate• Floating Rate

SOURCES OF LOCAL CURRENCIES



BACK-TO-BACK CROSS CURRENCY SWAPS – efficient funding source for local currency financing. Local currency will be sourced through executing hedges as disbursements take place. Target Delivery Date: 2019



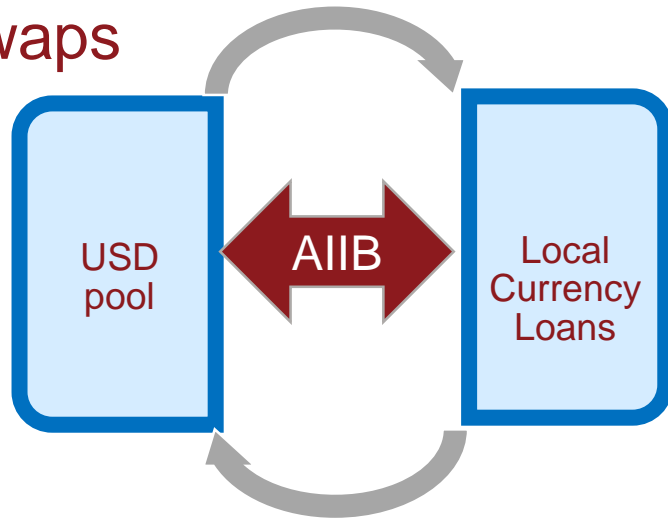
POOL FUNDING – creates an equivalent to a local treasury in markets where AIIB can achieve positive carry by managing a funded pool. In order to achieve attractive levels, a blended mix of swaps and off-shore bonds will fund the pool. Target Delivery Date: 2020



ON-SHORE ISSUANCE – serves a dual purpose: to raise funding in the local markets to provide local currency to clients; to help development of local capital markets in member countries. Target Delivery Date: 2020/2021 or later depending on capacity and AIIB's Corporate priorities

TWO MAIN SOURCES FOR BACK-TO-BACK LOCAL CURRENCY FUNDING

Swaps



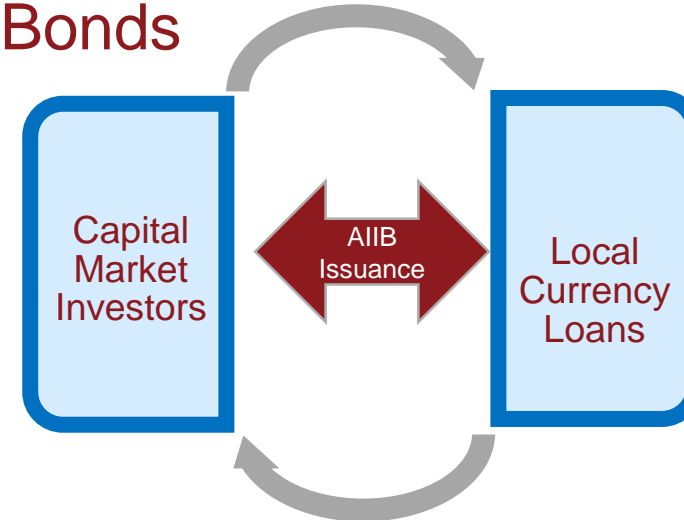
Pros:

- Timing of the disbursement and funding is matched
- Loans profiles can be matched precisely
- Fast execution

Cons:

- Needs reliable counterparts and legal framework
- Size may be limited
- Prepayments can be accommodated

Bonds



Pros:

- Additional development impact
- Local currency source where swaps market is not developed
- Potentially larger funding pool than swaps

Cons:

- Investor demand in offshore markets is not reliable
- Prepayments or amortizations are difficult or impossible to accommodate

Currency risk is transferred to swap counterparty / bond investor

LOCAL CURRENCY FINANCING FOR NON-SOVEREIGN CLIENTS

General terms

- Lending is based on sound banking practice
- The terms and conditions are set on a commercial basis.
- Available currencies (2019): IDR, INR, RUB, THB, TRY

Pricing is based on cost pass-through principle

AIIB's actual cost of borrowing in local currency:

- 1) Cost based on local market-based benchmark (government bond yield or a relevant reference rate)
- 2) Issuance or execution costs (underwriting fees, execution costs)
- 3) Recurrent costs (listing, custody, payment fees)

Plus

Corporate client's or project's credit spread, based on individual risks of the project or a corporate loan

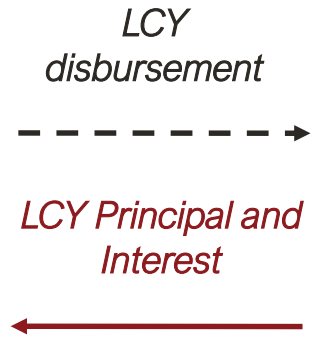
LOCAL CURRENCY FINANCING: DELIVERABLE VS SYNTHETIC

- Back-to-back funding through cross currency swaps or bonds
- Onshore or offshore source
- Pricing is based on a relevant local market reference rate
- Currency risk is passed on to a swap counterparty or bond investors

Deliverable local currency loans:

Clients receive local currency on a disbursement date and repay AIB principal and interest in local currency on loan service dates

AIB

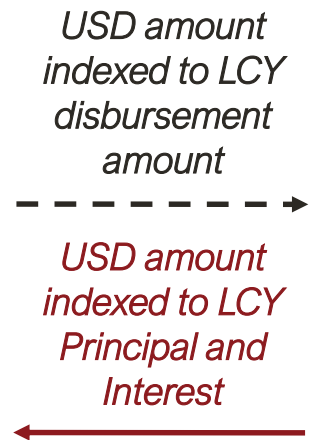


Client

Synthetic (or non-deliverable) local currency loans:

Clients receive USD equivalent of a local currency loan amount on a disbursement date and repay USD equivalent of a local currency principal and interest on loan service dates. The FX rate is based on prevailing FX spot rate at the time of payments

AIB

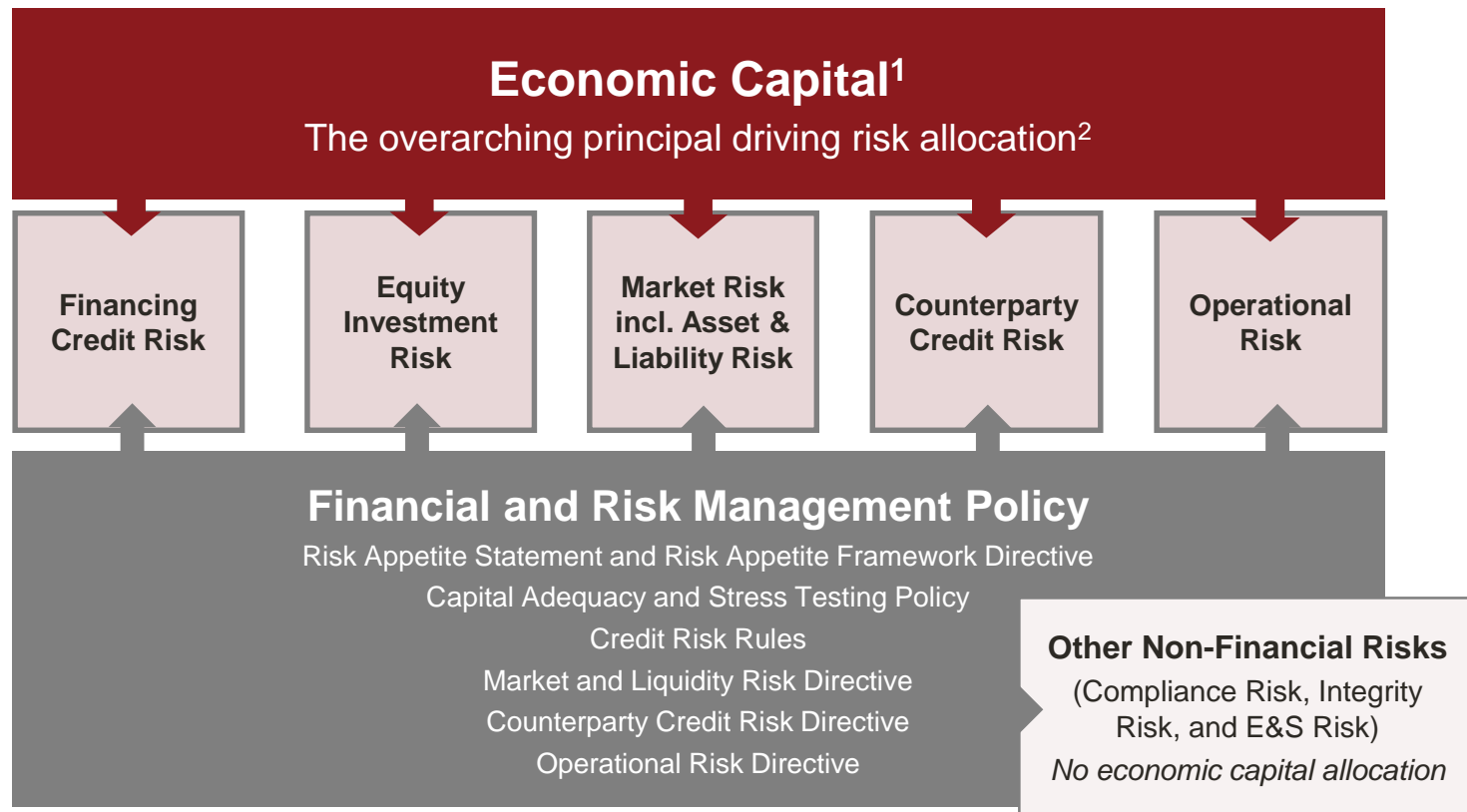


Client

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OVERVIEW OF CAPITAL & RISK MANAGEMENT

Economic Capital is the fundamental measure of risk appetite



Stress testing of the Ecap Model for extreme events, within 99.99% confidence intervals

Total Capital Utilization³

Available Capital: USD16.7 billion⁴

Allocation of Risk	Policy Limit	Current Usage ³
Operational Risk	2%	1.0%
Treasury Risk	18%	2.0%
<i>Market Risk</i>		0.3%
<i>Treasury Deposits</i>		1.7%
Credit Risk	80%	7.1%
<i>Equity Investments</i>		2.0%
<i>Nonsovereign Loans</i>		0.6%
<i>Sovereign Loans</i>		4.5%
Total Current Capital Usage		10.1%

AIIB's Financial and Risk Management Policy states that AIIB risk appetite is set at no greater than the bank's available capital (i.e., received paid-in capital and retained earnings).



Note 1: Economic Capital is defined as the capital the bank should hold to protect its net asset value falling below zero after a worst-case fair value loss over one year.

Note 2: The following financial risks are managed outside the economic capital model: Liquidity risk and Model Risk.

Note 3: Based on current usage of c. USD1,690 million of capital.

Note 4: As at June 30, 2019.

OVERVIEW OF KEY FINANCIAL POLICIES

Conservative and sound ALM, Market Risk and Credit Risk policies

The AIB has put in place strong policies on governance, finance, procurement as well as environmental and social frameworks

Asset Liability Management

- Swap counterparts must be institutions rated A or better.
- Credit exposure is mitigated via 2-way CSA agreements.
- Debt funding is swapped into a USD liability. The majority is expected to be held on a floating rate basis.
- Conservatively managed Liquidity portfolio should cover at least 40% of net cash requirements for the upcoming 36 months and 100% of net cash requirements for any upcoming 12-month period under extreme stress conditions.

Market Risk

- **Currency risk:** Currency risk matching for assets financed by debt. Unhedged currency exposure for equity funded and local currency assets can be permitted.
- **Interest rate risk:** Managed within internally set Value-at-Risk (VaR) and duration limits.

Financing Credit Risk

- Country exposure limit of 50% of total exposures.
- Gearing ratio limit set at 1:1.
- Third party sourced and calibrated credit scoring tools for Project risk ratings.
- Nonsovereign financing terms in line with market practices.



AIB's risk management framework is made up of policies, directives and administrative guidances to assess, measure, monitor and report on a range of risks. Exposures to quantifiable risks are managed both at the transaction level and via portfolio risk limits.

All risks are managed to defend, preserve and protect AIB's triple-A ratings.

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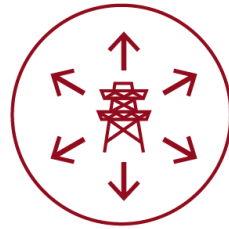
AIIB'S THEMATIC PRIORITIES

We approach lending, developing our business lines and selecting our projects based on three thematic priorities



Sustainable Infrastructure

Promoting green infrastructure and supporting members to meet their environmental and development goals, especially their commitments under the Paris Agreement and the United Nations' Sustainable Development Goals.



Cross-border Connectivity

Prioritizing cross-border infrastructure, ranging from roads and rail to ports, airports, energy pipelines and telecoms.

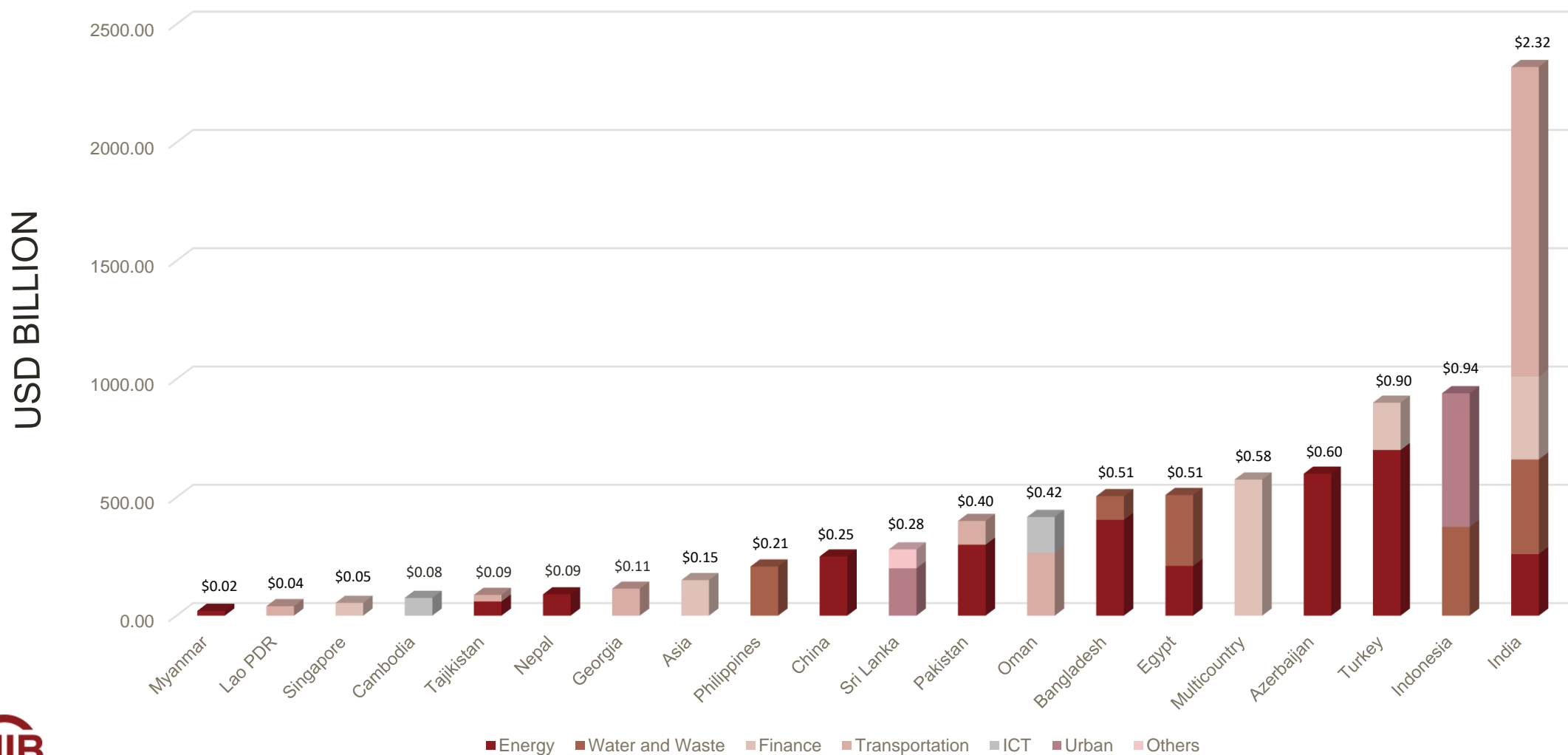


Private Capital Mobilization

Devising innovative solutions that mobilize private capital, in partnership with other MDBs, governments, private financiers and other partners. AIIB's presence on cofinancings helps spread risk across the MDB and private sector communities, and can help to crowd in private sector capital.

INVESTMENT OPERATIONS

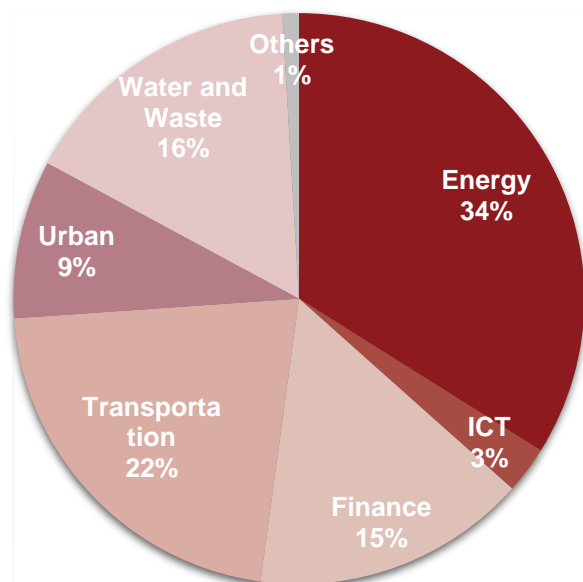
Investment Operations approved – USD8.53 billion



PROJECT BREAKDOWN

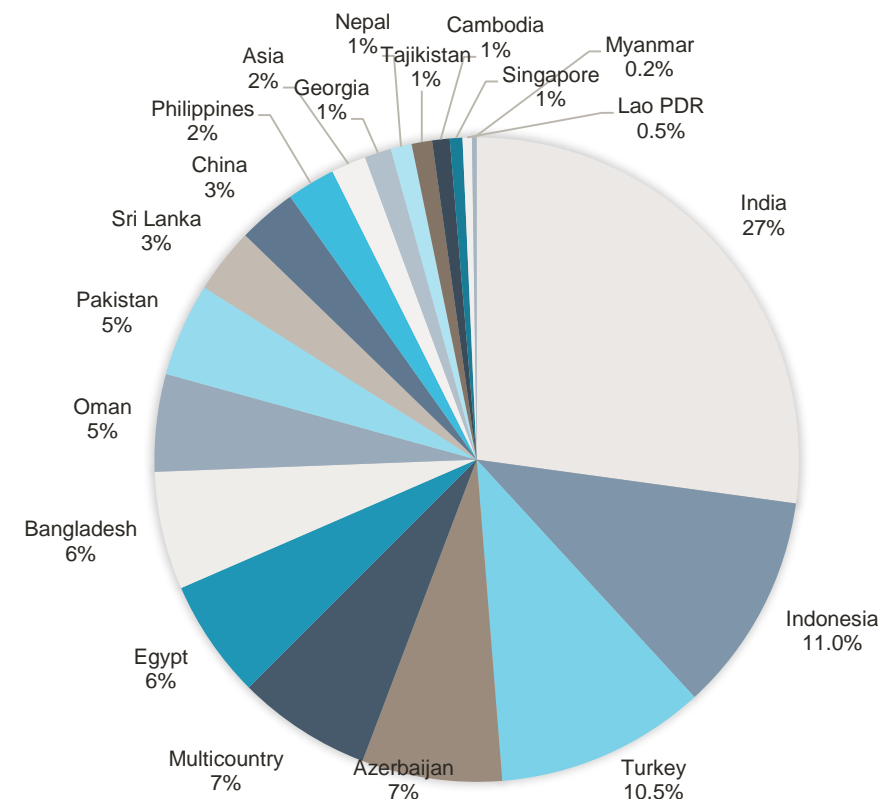
Projects Approved – USD8.53 billion

Approved Projects by Value - Sector



- AIB’s sector or regional strategies do not favor one type of project or member/region over any other. AIB’s conservative investment approval process, which requires that all projects are financially viable and incorporate AIB’s commitment to sound environmental and social risk management, are key considerations for project approval.
- Over the coming three years, AIB expects investments in the Energy and Transport sectors to represent between 60 and 70% of its total exposure. While currently active in 19 members, by 2020 AIB expects to have active projects in 24 members.
- The loan book and equity investments expected to reach USD45 billion and USD2.5 billion by 2027 respectively.

Approved Projects by Value - Member / Region



AIB’s **Sustainable Energy for Asia Strategy** sets out a clear framework for investing in energy projects that will increase access to clean, safe and reliable electricity for millions of people in Asia. To implement the strategy, the bank will support its members to do their part as expressed in the Paris Agreement to "hold the increase in the global average temperature to well below 2 degrees Celsius above pre industrial levels and pursue efforts to limit the temperature increase to 1.5 degrees Celsius."

AREAS OF OPERATIONS

Range of instruments offered

Sovereign loans

- Sovereign-backed loans will have an average maturity of up to 20 years and a final maturity limit of up to 35 years.
- Cofinanced sovereign lending will be encouraged.
- Appraisal of sovereign loans will take into account a full assessment of the project's benefits, risks and borrower implementation capacity.

Non-sovereign backed financing

- The bank is taking a progressive approach to building its book of non-sovereign backed financing. This approach is based on sound banking practice.
- Borrowers could range from sub sovereign public entities to private enterprises.
- The terms and conditions will be set on a commercial basis and reflect the expected risk to the bank and market conditions.
- Loan amounts can be up to 35% project.

Equity Investments

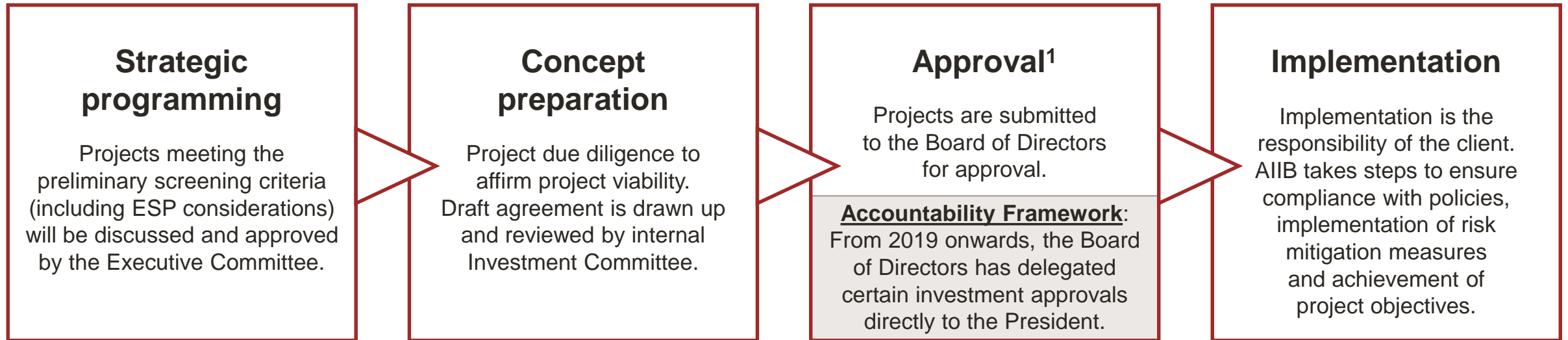
- The bank will only consider making equity investments under terms it considers fair, where clear potential exit strategies are present, and where an acceptable internal rate of return is projected.
- Limit on Equity investments up to 10% of available capital.
- The bank expects to play the role of a minority investor and shall not seek a controlling interest in the target entity or enterprise.

Guarantees

- The bank aims to offer guarantees.
- Projects involving guarantees will be appraised, processed, and monitored the same way as loans.
- For capital headroom and exposure management purposes, guarantees will be treated as if they were on the balance sheet (i.e. treated the same way as loans).

PROJECT APPROVAL PROCESS

AIB follows a clear and well-defined approval process to ensure sustainable, high quality projects



- For sovereign-backed financing, Board of Directors' approved financial policies require approvals to be based on use of loan proceeds for intended purpose.
- For nonsovereign-backed financing, Board of Directors' approved financial policies require credit decisions to be based on sound assessments of the borrower's capacity to service a loan. Before Approval, the team conducts detailed due diligence, and prepares documentation.
- Environmental and social assessments are carried out to ensure that **all** projects comply with the bank's ESP policy.



On maturity of all loans, a **Project Completion Report** is required, evaluating the project, its financing and performance impact compared to initial objectives. The conclusions are fed back into the project analysis and review process, to continuously improve the bank's decision-making framework. This ensures rigorous accountability for implementation and ultimate success.

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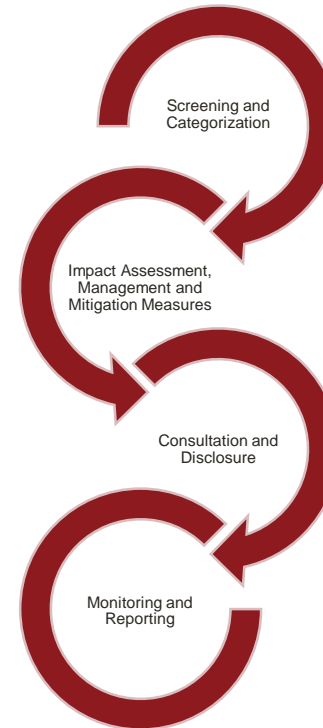
AIIB'S COMMITMENT TO SUSTAINABLE GROWTH

Environmental and Social Policy (ESP) at the core of the organization

The bank recognizes that environmental and social sustainability is a fundamental aspect of achieving outcomes consistent with its mandate.

The bank:

- Screens and categorizes each proposed project based on its potential environmental and social risks and impacts.
- Requires environmental and social assessments.
- Identifies actions to avoid, minimize, mitigate and/or offset impacts.
- Includes provisions for disclosure of information and public consultation.
- Every project has a Grievance Redress Mechanism accessible to the general public.
- Mandatory requirements that apply to Clients and Operations are set out in 3 Environmental and Social Standards:
 - i. Environmental and Social Assessment and Management.
 - ii. Involuntary Resettlement.
 - iii. Indigenous Peoples.



- Ensure the environmental and social soundness and sustainability of each project.
- Support integration of environmental and social aspects of projects into the decision-making process by all parties.
- Provides for public consultation and disclosure
- Projects have Environment and Social Management Plans to support effective implementation of management and monitoring measures.
- Regular monitoring and reporting required by the Client on implementation of the environmental and social measures agreed with the bank.
- The bank also conducts periodic site visits and comprehensive field-based reviews to ensure compliance with the ESP and applicable ESSs.



Every project is subject to AIIB's Environmental and Social Policy, Environmental and Social Standards, and Environmental and Social Exclusion List

AIIB'S ENVIRONMENTAL, SOCIAL AND GOVERNANCE (ESG) RATINGS

In 2018, AIIB has been rated for the first time by rating agencies based on industry-specific social, environmental and governance (ESG) criteria. The bank was assigned a “C+ (Prime)” rating by ISS-oekom and a score of 66 out of 100 points by Sustainalytics.



“The Asian Infrastructure Investment Bank (AIIB) has established an Environmental and Social Policy and Framework (ESF), which serves to manage and minimize risks associated with the activities it finances. It includes comprehensive standards on resource efficiency, climate change and labour rights and the protection of vulnerable populations, as well as reasonable standards on pollution prevention, ecosystems and biodiversity, resettlements, community health and safety, and security personnel.”

“As regards transparency and accountability, AIIB forms part of the more progressive development banks, publicly disclosing individual project financed on its website (including project overviews, financing information and project documents).”

ISS-Oekom Corporate Rating, April 2019 (available [here](#))

The Asian Infrastructure Investment Bank (AIIB) “is considered an average performer on ESG issues compared to its industry peers.”

“AIIB’s success relies on its ability to recruit and motivate a highly skilled workforce able to identify, invest in and monitor commercially sound projects with positive economic impacts.”

“The company’s ESG-related issues are overseen by the board or the executive team, suggesting that these are integrated in core business strategy.”

Sustainalytics ESG Report, November 2018



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