

Sustainable Performance Group

Monthly Report June 2010

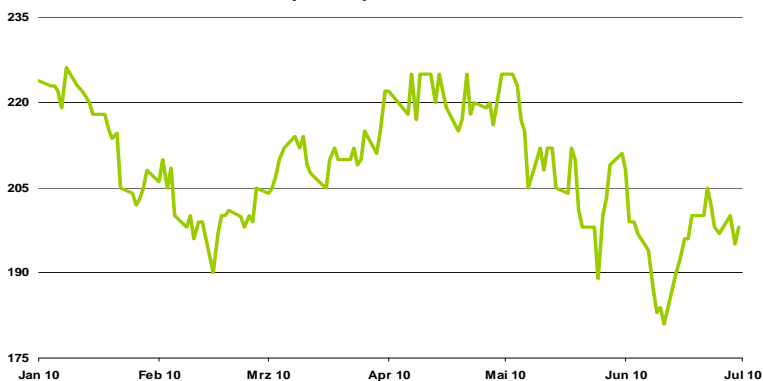
PORTFOLIO COMMENT

Following a brief respite, international stock markets resumed their downward trend from mid-month. Fears that the economic recovery could be subsiding again disconcerted investors. U.S. labor market data, in particular, were very weak. Jobless claims unexpectedly rose again in June. The Swiss franc continued to strengthen against the euro and the U.S. dollar, extending foreign investment losses. As a result, the share price of the Sustainable Performance Group declined by 6.2%. Contributions of the four investment themes were relatively balanced in June. Canadian Solar was one of the worst performers after it became known that some orders had not been booked in the correct period. The recovery of the Yingli Green Energy stock from its lows indicated that solar companies continue to enjoy very positive business developments despite unfavorable exchange rate trends and in mid-term still holds an above-average performance potential. The new investment in Green Mountain Coffee Roasters also ranked among the stocks with a positive performance (in CHF). The company profits from the sale of coffee capsules, in particular, a trend that is also catching on fast in the United States.

PORTFOLIO COMPANY: ATRIUM INNOVATIONS

Atrium Innovations is a leading company in the health and wellness industry. It develops high-quality food supplements, marketed through health professionals such as doctors and physiotherapists. An aging population and a growing level of health consciousness are producing an increased demand for products that help to maintain good health. Manufacturers of specialized food supplements benefit in particular from this trend. With its high quality products, Atrium has a strong position in this market – a market which is growing by 15% per year. This position is further strengthened through a carefully targeted acquisition strategy. Atrium currently enjoys a market share of over 15% in the US, in what is a highly fragmented food supplements market. Atrium exploits synergies between its various markets in a highly successful manner.

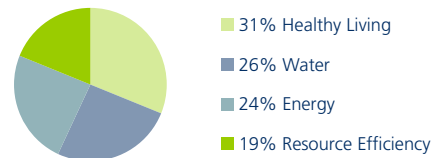
SHARE PRICE DEVELOPMENT (IN CHF)



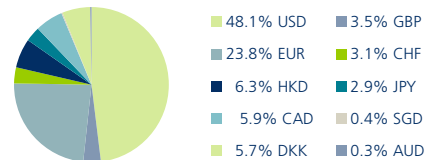
Sustainable Performance Group AG

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INVESTMENT THEMES



CURRENCIES



TEN LARGEST POSITIONS

Company	In %
American Water Works	3.3
Novo Nordisk	2.9
Atrium Innovations	2.9
Chaoda Modern Agriculture	2.8
Yingli Green Energy	2.7
Iberdrola Renovables	2.5
Quanta Services	2.5
Thermo Fisher Scientific	2.5
ITC	2.5
Noble	2.4

PERFORMANCE

	YTD	1 Month	in CHF
Share Price	-11.6%	-6.2%	198.00
NAV	-13.0%	-10.1%	186.38
Premium/Discount			6.2%

MARKET CAPITALIZATION + CONVERTIBLE BOND (IN CHF)

CHF 182'481'000.-