

EQ Future Leaders

Invest responsibly using low-cost funds.

EQ Future Leaders is managed with a dual mandate to achieve long term capital growth at low cost by investing responsibly.

Responsible investing

Responsible investment means to avoid harmful businesses and enhance an investment's environmental and social characteristics compared to traditional benchmarks.

To achieve this, the portfolios have a stringent exclusions policy, with specific thresholds covering all funds and asset classes. On top of that the portfolios achieve higher ESG performance and lower carbon footprints versus our benchmarks.

Designed to mirror global market returns

The portfolios are globally diversified and embed careful risk management at fund and portfolio level to closely track the performance of the market while staying within EQ's responsible framework. The aim is to provide consistent returns year on year.

Low cost

These portfolios are built using low cost funds.

What can ESG data tell us?

Environment

How a company impacts the natural environment, for example through water use or carbon emissions.

Social

How a company treats people, such as its employees, its customers, and its local community.

Governance

How the business polices itself, including the independence and expertise of its board.

Key features

- Excludes 10 harmful activities including armaments, fossil fuel extraction, tobacco and gambling.
- Excludes corporate ESG laggards that behave irresponsibly.
- Available on platforms for ISAs, SIPPs, GIAs and offshore bonds.
- Intentionally targets a higher average ESG and lower carbon footprint compared to traditional investments.
- Fully managed, with 8 MPS and 2 unitised risk-rated profiles, globally diversified across asset classes.
- Highly liquid.

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A transparent investment philosophy

Here is what you can expect from EQ Future Leaders:

A consistent approach to avoiding harm

The portfolios have a stringent exclusions policy covering these 10 business activities, with specific thresholds covering all funds and asset classes:

- Adult entertainment
- Alcohol
- Controversial weapons
- Civilian firearms
- Military weapons
- Gambling
- Fossil fuel exploration & production
- Thermal coal extraction
- Thermal coal electricity generation
- Tobacco

The portfolios additionally have a stringent approach to avoid controversial business behaviour.

- Violations of international norms
- ESG laggards* in each sector

Promoting social and environmental characteristics

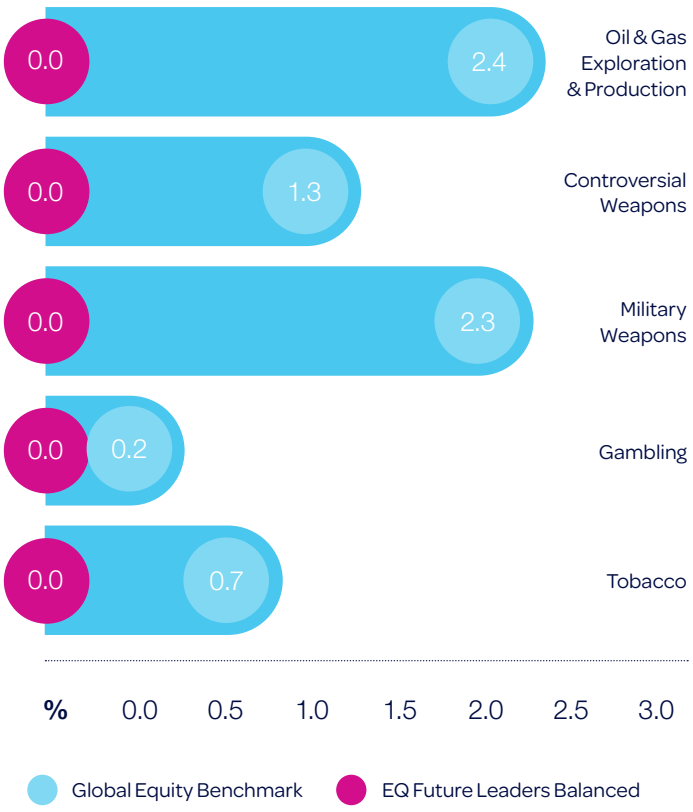
Beyond our strict exclusions, the portfolios select funds with stronger sustainability profiles. Our equity allocation promotes social and environmental characteristics by targeting a higher average ESG score and lower carbon footprint than the global traditional benchmark**, which we transparently report on.

**Global equity market benchmark proxy: SPDR MSCI ACWI IMI

Stewardship matters

Stewardship and engagement are at the core of the funds we hold. We pay particular attention to how the asset manager uses voting rights and company relationship to drive positive change. We prefer those that use their influence to improve sustainability profiles and reduce risks. EQ's own stewardship strategy additionally contributes directly to improvements across key themes like climate change or human rights.

Portfolio alignment to exclusion categories is monitored



Data: EQ Investors, as of August 2026

Past performance is not a guide to future performance. The value of investments and the income derived from them can go down as well as up, so you could get back less than you originally invested.

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