

Future Leaders Portfolios



Invest in the sustainability leaders of tomorrow

A range of passive, multi-asset portfolios for everyone who wants to invest sustainably at a low cost.

Managed by EQ Investors, a leading investment firm with over 10 years' experience in sustainable investing. Future Leaders combines investors' growing preference for socially responsible portfolios with the increasing popularity of low-cost passive funds.

✓ Low Cost

These portfolios are built using efficient passive funds with low fund charges.

All our portfolios are globally diversified, and regularly rebalanced to reflect our views on the potential returns from different markets.

✓ Sustainable

Future Leaders portfolios select the most sustainable companies based on published Environmental, Social and Governance ('ESG') data.

They also use thematic funds to provide an overweight to sustainable sectors (clean energy, healthcare and green bonds).

✓ Low Carbon

All this means that Future Leaders portfolios have a lower carbon footprint than market benchmarks.

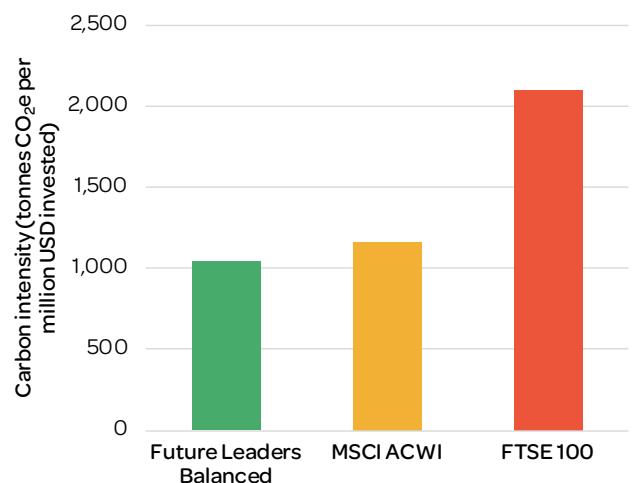
And based on our scenario analysis, they are compatible with limiting global warming to 1.5 degrees.

Key features

- Invest in 'ESG leaders' – companies with the best published Environmental, Social and Governance data.
- Low carbon footprint – aligned to the Paris climate agreement targets.
- Hard negative screens – including armaments, tobacco & gambling.
- Fully managed – eight risk-rated profiles, globally diversified across asset classes.
- Available on platform for ISAs, SIPPs and GIAs.
- Highly liquid – sustainable index trackers and Exchange Traded Funds (ETFs).
- Portfolio management fee: 0.24%–0.10% (depending on AUM)
- Underlying fund charges: ~0.25%

Carbon footprint

The chart below shows how Future Leaders compares with market indices:



Analysis based on Scope 1, 2 & 3 emissions.
Carbon data: Urgentem (2020).

Sustainability credentials

Passive investing lends itself well to a best-in-class approach and can also incorporate negative screening:



A voiding harm

Future Leaders screens out the most harmful sectors:

-  No tobacco
-  No armaments
-  No alcohol
-  No gambling

Benefiting stakeholders

Portfolios are built using passive tracker funds that target the most responsible companies based on publicly available Environmental, Social and Governance (ESG) data.

These 'ESG leaders' demonstrate good corporate governance and are actively managing their social and environmental impacts.

Contributing to solutions

We use thematic tracker funds to increase portfolio exposure to sectors that are helping to solve global problems.

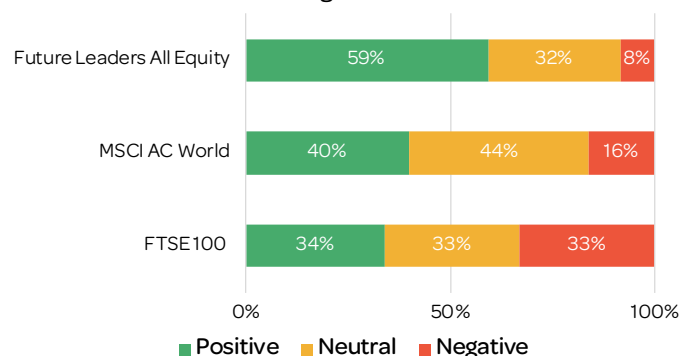
We use the Sustainable Development Goals as a framework for maximising our impact. Thematic overweights currently include healthcare, clean energy and green bonds.

Investing for the UN Sustainable Development Goals

Our proprietary analytics looks under the bonnet of investment portfolios to show whether holdings are making positive contribution to the UN Goals. The chart below shows how Future Leaders compares with market indices:



Investments aligned to the UN Goals



Find out more

If you have a question about the EQ Future Leaders portfolios, please speak to your financial adviser.

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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