

# 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.

Are you looking for a low cost, socially responsible investment portfolio? Future Leaders is managed by EQ Investors, a leading investment firm with over 10 years' experience in sustainable investing.

## ✓ 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.

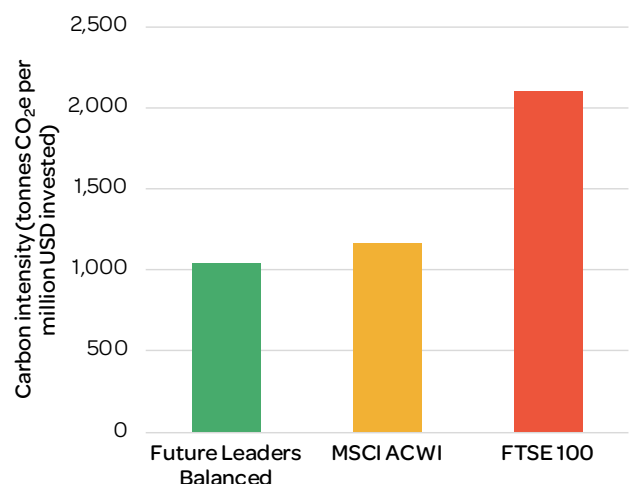
And based on our scenario analysis, they are compatible with limiting global warming to 1.5 degrees.

### 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.
- A one-stop-shop solution for your ISA, pension or general investment account.
- Tailored to you – suitable for all investors with our wide range of risk profiles.
- Highly liquid – sustainable index trackers and Exchange Traded Funds (ETFs).
- Low 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

## B enefiting 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.

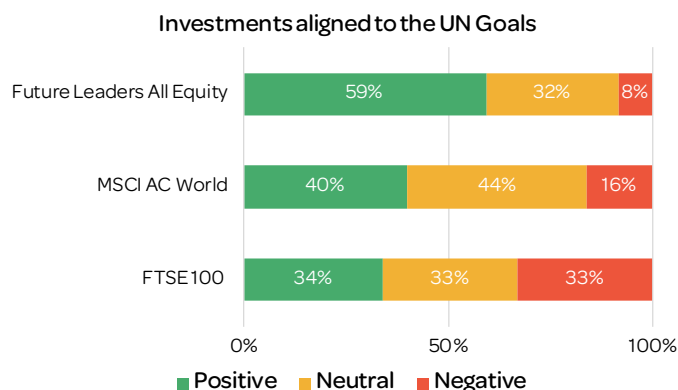
## C ontributing to solutions

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 look 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:



## Find out more

If you have a question about the EQ Future Leaders Portfolios, we'd love to hear from you:

[eqinvestors.co.uk/future-leaders/](https://eqinvestors.co.uk/future-leaders/)

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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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