



Leaders in  
sustainable investing



*Discretionary fund management  
for financial advisers*





- ✔ A discretionary fund manager focused on sustainable and impact investing
- ✔ Building partnerships with advisers across the UK and around the globe
- ✔ Offering award-winning active, passive and bespoke investment solutions

## Why use a discretionary fund manager (DFM)?

Working with a DFM is the right way to outsource the day-to-day asset allocation and fund selection decisions for your clients' investment portfolios – enabling you to focus your time on your clients and their financial planning needs.

## Why choose EQ?

**We act as discretionary fund managers for advisory firms across the UK.**

- ✔ We aim to maximise both investment returns and sustainability for your clients' portfolios.
- ✔ Our diversified, multi-asset portfolios offer a complete investment solution enabling you to focus your time on what you do best.
- ✔ Our award-winning impact reporting, including carbon exposure analysis and Sustainable Development Goal (SDG) mapping, helps your clients to connect their investments with their values.
- ✔ Model portfolios are available in a full range of wrappers on 20+ platforms. Eight risk levels offer equity exposures ranging from 30%–100%.
- ✔ Portfolios are available both in the UK, and for offshore investors in three currencies: GBP, USD and EUR.
- ✔ We have a strong track record in running bespoke mandates for individuals, charities and other institutions.



## Award-winning research

**Our experienced team has won recognition for best practice in sustainable investing.**

- ✔ We invest in cutting-edge research tools and data in order to select the best funds and measure our impact.
- ✔ We work in close partnership with our fund managers to drive best practice across the industry.
- ✔ We align our due diligence to the best and latest industry standards and initiatives.



# Sustainable model portfolios tailored to your clients



#futureleaders

Passive portfolios for clients aiming to invest sustainably at low cost.

- ✓ Invests in companies with strong Environmental, Social and Governance (ESG) profiles.
- ✓ Multi-asset portfolios of ESG-integrated and thematic index funds and ETFs.
- ✓ Incorporates both negative screens and overweights in sustainable investment themes.



#climateaction

Hybrid portfolios for clients who want to invest towards a low carbon future.

- ✓ Invests in climate solutions, low carbon leaders, and companies with credible net zero transition plans.
- ✓ Hybrid portfolios keep costs low while maintaining a dual focus on financial returns and climate impact.
- ✓ Portfolio reporting on carbon and active engagement towards net zero.



#positiveimpact

Active portfolios for clients aiming to maximise their impact and returns.

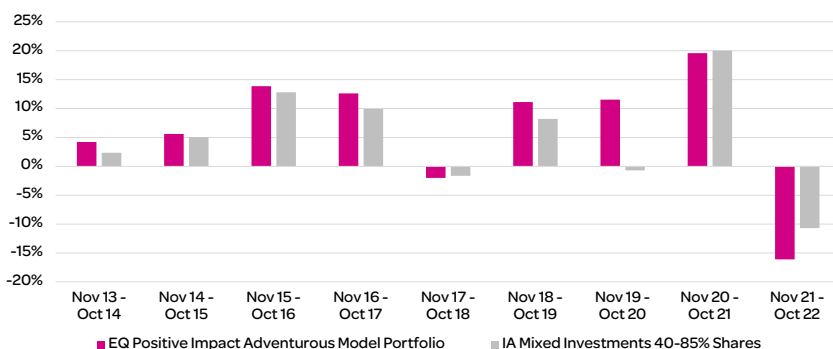
- ✓ Invests in companies whose products and services help and solve social and environmental problems.
- ✓ Multi-asset portfolios of actively managed funds running dedicated impact strategies.
- ✓ Detailed impact reporting using environmental and social impact metrics.

Our **Bespoke Service** is typically suitable for high net worth clients who want to benefit from a wider investment universe, unconstrained by model or platform restrictions. They may also want bespoke impact reporting, or need to structure their investments to create tax efficiencies. Whatever your needs, your EQ Investment Manager will be on hand to offer you support.

For more details, please visit [eqinvestors.co.uk/advisers/bespoke](https://eqinvestors.co.uk/advisers/bespoke)

## Strong 9-year track record

Our flagship Positive Impact portfolios boast over 9 years of strong performance compared to their market benchmarks. To download factsheets, please visit [eqinvestors.co.uk/advisers](https://eqinvestors.co.uk/advisers)



### Cumulative

EQ Adventurous	71.99%
IA Mixed 40-85%	51.03%

### Annualised

EQ Adventurous	6.21%
IA Mixed 40-85%	4.69%

EQ performance figures include a management fee of 0.32%

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



## Mainstreaming sustainable investments since 2012

EQ's experienced investment team has been pioneering impact investing – seeking out investments that make a measurable positive impact and a financial return – for over a decade. As a Certified B Corporation, investing for good is in our DNA.

- ✓ Our impact journey goes back to 2008, when we helped launch a microfinance initiative in Sierra Leone – followed by a private equity fund investing in high impact companies in emerging markets in 2011.
- ✓ In 2012 we launched our flagship Positive Impact portfolios, making social and environmental impact investing available to retail investors.
- ✓ In 2015 we were certified as one of the UK's founding B Corporations: the international standard for companies that believe in business as a force for good.
- ✓ In 2019 we made Positive Impact available to offshore investors, and in 2020 we launched Future Leaders – a new range of sustainable, passive portfolios.
- ✓ In 2022 we launched Climate Action – our latest range of hybrid portfolios for clients aiming to invest towards a low carbon future.



## SUSTAINABLE DEVELOPMENT GOALS

### Investing for the UN Sustainable Development Goals

Our proprietary analytics looks under the bonnet of investment portfolios to show whether holdings are making positive contributions to the UN Goals.

For more details and to download our latest impact report, please visit: [eqinvestors.co.uk/advisers](https://eqinvestors.co.uk/advisers)



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EQ/0121/401