

# Positive Impact Portfolios



*Invest in solutions to social and environmental challenges*

The Positive Impact portfolios are managed with a dual mandate: to achieve long-term capital growth by investing in solutions that address the world's major social & environmental challenges.

EQ Positive Impact Portfolios have been pushing the boundaries of what can be achieved with a retail impact investing portfolio for over 10 years.

## ✓ Global Goals

Positive Impact is designed around the UN Sustainable Development Goals to address the biggest challenges faced by humanity.

## ✓ Solution focused

Positive Impact naturally avoids controversial sectors by investing in companies that contribute to solutions.

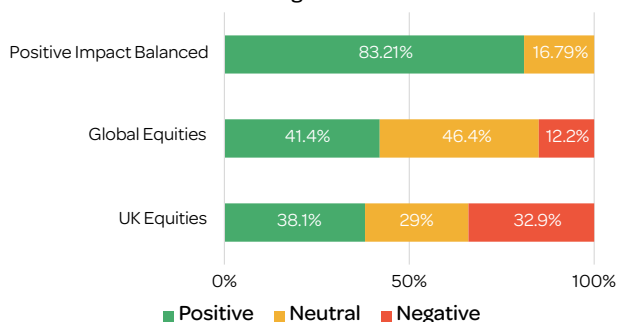
## ✓ Visible impact

Our impact reports, calculator and case studies are all designed to bring to life the impact associated with investments and EQ's stewardship.

### SUSTAINABLE DEVELOPMENT GOALS



#### Investments aligned to the UN Goals



Comparison data as at May 2024. Source: EQ.

### Key features

- Diversified portfolios of actively managed funds running dedicated impact strategies
- Award-winning impact reporting, designed to help clients connect to their money
- Awarded a 5/5 star rating by Defaqto
- Globally diversified across asset classes, with 8 risk profiles ranging from 30-100% equity
- Available for ISAs, SIPPs, GIAs and offshore bonds on a wide range of adviser platforms
- Portfolio management fee: 0.33%–0.18% (depending on AUM)
- Underlying fund charges: ~0.6%

# What we invest in



## People

### We support

- ✓ Affordable housing
- ✓ Education
- ✓ Financial inclusion and insurance
- ✓ Healthcare
- ✓ Sanitation
- ✓ Social care
- ✓ Sustainable food

### We avoid

- ✗ Adult entertainment
- ✗ Alcohol
- ✗ All armaments and military contracting
- ✗ Gambling
- ✗ Tobacco
- ✗ Unhealthy food and beverages

## Planet

### We support

- ✓ Circular economy
- ✓ Clean energy
- ✓ Conservation of natural resources
- ✓ Energy efficiency
- ✓ Recycling
- ✓ Sustainable infrastructure
- ✓ Sustainable transport

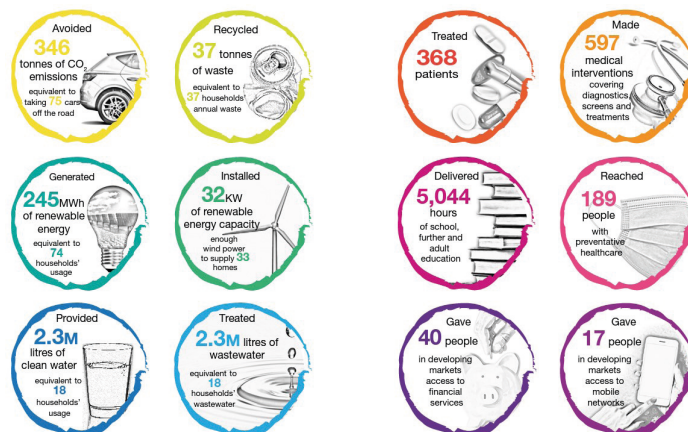
### We avoid

- ✗ Air travel
- ✗ Animal farming
- ✗ Fossil fuel exploration, production, distribution and service
- ✗ Mining
- ✗ Palm oil
- ✗ Pesticides
- ✗ Thermal coal

*These lists are not exhaustive.*

## Impact calculator

- If you're invested in one of our EQ Positive Impact Portfolios, we'll provide a breakdown of the impact associated with your investments over the last twelve months.
- Metrics displayed are an example based on the impact associated with £1,000,000 investment in the Adventurous portfolio over the last year.



## Find out more

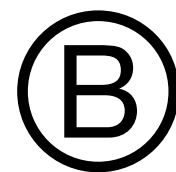
If you have a question about the EQ Positive Impact portfolios, please speak to your financial adviser.

**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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**Certified**



**Corporation**