

EQ Investors | Vision Sustainable MPS

Invest to achieve positive outcomes for the environment & society alongside financial returns.



A dynamic range of portfolios that use a multi-lens sustainability framework to deliver a positive future.

For investors who want their investments to generate long-term returns and prioritise sustainability. The EQ Investors-Vision sustainable strategy revolves around three key pillars: Impact Leaders, ESG Leaders & Climate Focus. We believe incorporating a range of sustainable factors contributes to your number one priority: generating positive outcomes for your clients.

Impact Leaders

We select specialist impact fund managers that invest in companies whose core products & services contribute towards the UN Development Goals.

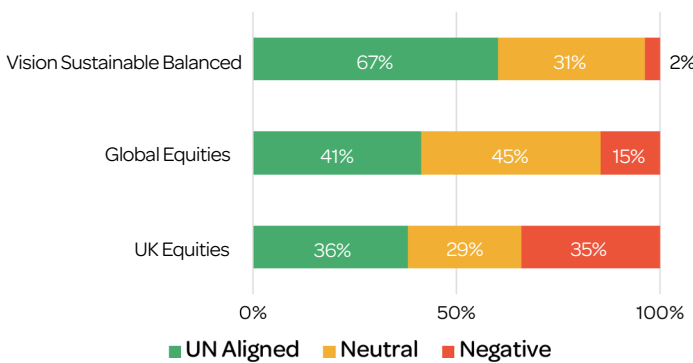
ESG Leaders

By focusing on ESG Leaders, these funds invest in companies that are best managing environmental, social and governance risks (ESG).

Climate Focus

Selects funds that invest in companies transitioning to a net-zero emissions global economy. 40% of holdings have set science-based targets to reduce their emissions.

Portfolios aligned to the UN Goals

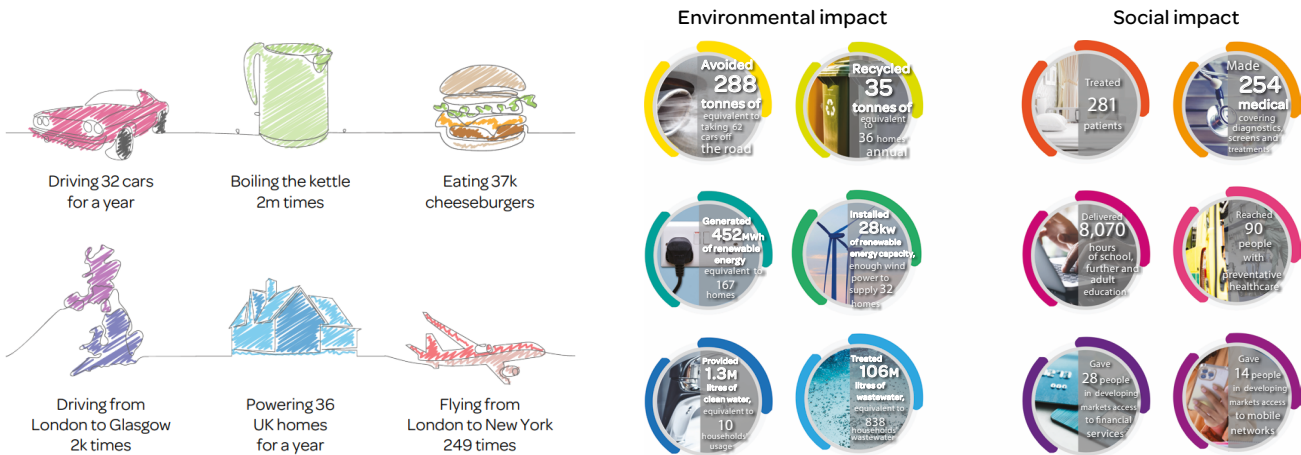


Source: EQ analysis, 2024.

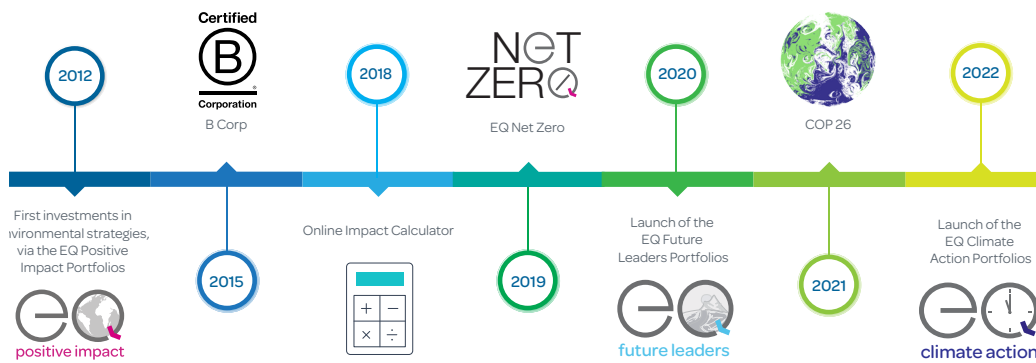


Key features

- Globally diversified & risk managed multi-asset portfolios.
- A hybrid active-passive approach.
- Volatility targeting & drawdown framework.
- Four risk profiles available: cautious, balanced, balanced plus & adventurous.
- Three-pillar strategy optimises sustainability outcomes.
- Avoids ESG laggards and controversial sectors.
- Emphasis on stewardship underpins active ownership approach.
- Available for ISAs, SIPPs, GIAs & offshore bonds.
- Suitable for portfolios over £40,000.



Sustainability expertise



Find out more

For more information, please get in touch: visionenquiries@eqinvestors.co.uk



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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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