

Getting the most from

Your EQ portal



Track your EQ portfolios online

Introducing your portal

The portal offers you complete transparency, with full visibility of investment performance and recent transactions for your EQ portfolios.



We've designed the portal to give you the information you need in a secure, user friendly and accessible format.

This quick start guide provides an at a glance run-through of some of the key features. We hope you find the portal straightforward to use and welcome any feedback or suggestions you may have on how to improve it.

Warm regards,

Simon Noakes

Head of Technology, EQ Investors



Logging in:

To log in to your dedicated EQ Vision Portal visit:

clientportal.eqinvestors.co.uk/visionlogin



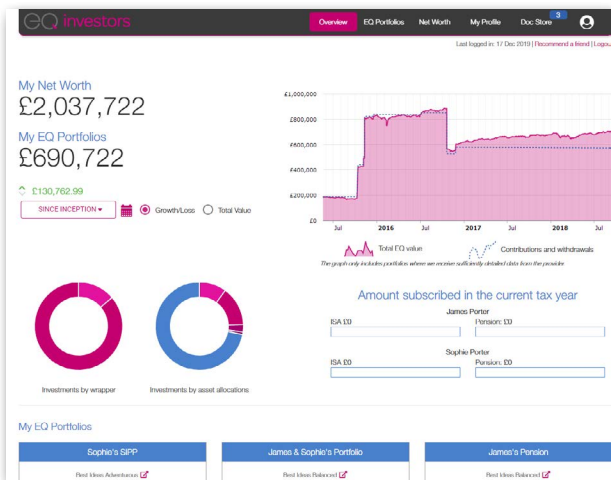
Create an app shortcut:

It's simple to set up a shortcut for direct access to the EQ Vision Portal on your mobile. Visit the link above and click the share button  (on iOS) or open your browser menu  (on Android). Then select 'Add to Home Screen'.

Dashboard

When you log in, you'll see an overview of your account, showing:

- Total net worth.
- The value of the portfolios managed by EQ.
- Overall investment performance.
- How much you have subscribed to ISAs and pensions in the current tax year.



Secure sign-in

Our portal is built in accordance with the latest industry-standard protocols, some of which are highlighted below:

Encryption and validation

The portal employs two-factor authentication (2FA), adding an extra layer of security to your account.

Last logged in date

The time and date of your last login, a good way of checking nobody else is using your account, is displayed in the top corner of the page when you log in.

Logging out

You will be logged out automatically after a period of inactivity.

Performance

Tracking your portfolio value has never been easier. The interactive slider chart provides the ability to view performance, contributions and withdrawals over any period.



Your portfolio holdings

You can quickly visualise the diversification and global reach of your portfolio. You can also see the funds and specific percentages we use to build your portfolio.

Transactions Holdings

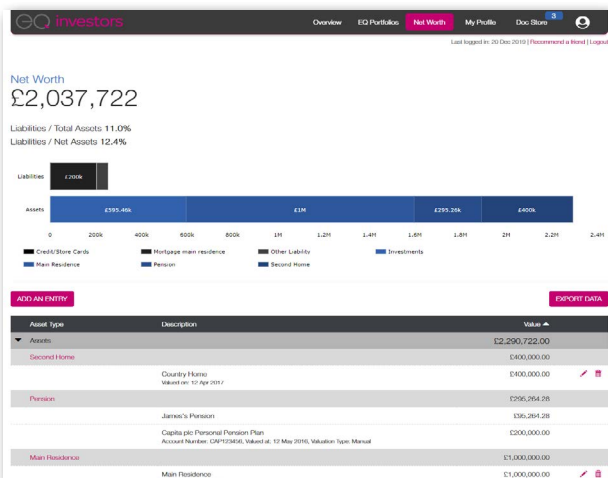
My Aggregated Holdings FILTER HOLDINGS EXPORT DATA

Holder Name	Units	Cost	Latest Price	Value	% Allocation	Profit / Loss
Total				£334,971.40		£43,865.77
CT Responsible Global Equity 2 Acc	8,512	£46,718.47	£8.62	£76,330.39	8.6%	£3,611.92
Janus Henderson Global Sustainable Equity 1 Inc	9,033	£34,899.30	£3.41	£48,872.59	7.0%	£13,973.29
Ninety One UK Sustainable Equity K Acc	92,210	£42,922.22	£1.42	£48,669.73	7.2%	£4,747.51
Schroder Global Sustainable Value Q1 Acc	89,136	£46,738.42	£3.52	£46,315.09	7.2%	£420.33
Ninety One Global Environment K	30,162	£37,891.10	£1.49	£44,872.44	7.0%	£3,981.34
Fidelity Sustainable Water & Waste F1 Acc	42,818	£40,264.64	£1.03	£44,145.72	6.9%	£3,881.08
Balfour Beatty Positive Change B Acc	12,900	£28,104.68	£3.40	£41,000.01	6.4%	£12,901.33
Impax Environmental Leaders S Acc GBP	28,006	£22,027.21	£1.40	£40,258.17	6.2%	£17,230.96
Impax Asian Environmental Markets S Acc GBP	30,802	£26,429.98	£1.02	£31,416.29	4.9%	£4,986.31
ICASH	27,502		£1.00	£27,502.14	4.3%	
Wellington Global Impact Bond GBP S 11 Acc	2,619	£26,562.53	£9.84	£25,781.30	4.0%	£781.23
Fidelity Responsible & Sustainable Sterling Bond B Inc	21,128	£24,410.82	£1.10	£23,156.55	3.6%	£1,254.27
Alexis IM Sustainable Development Equity K Acc GBP	2,341	£27,267.47	£9.03	£23,010.59	3.6%	£4,256.88
AWA ACT Green Bond Short Duration 2 Acc	20,683	£20,253.25	£0.97	£20,029.99	3.1%	£223.26
Regan Global Equity Impact Solutions F Acc	18,463	£20,156.36	£1.08	£19,958.96	3.1%	£197.40
FP Foresight UK Infrastructure Income A Acc	13,883	£18,695.25	£1.40	£19,403.37	3.0%	£708.12
Balfour Beatty Health Innovation Y Acc	25,775	£29,296.94	£1.75	£19,299.44	3.1%	£9,997.50
Federated Hermes Impact Opportunities Equity X Acc GBP	9,279	£12,061.30	£1.43	£13,250.52	2.9%	£1,189.22
Liontrust Sust Future UK Growth 2 Acc	4,933	£13,047.27	£2.49	£12,269.48	1.9%	£1,777.79
Stewart Investors Global Emerging Markets Leaders Sustainability CIA	13,049	£12,401.26	£0.94	£12,219.81	1.9%	£181.45
Astoria Positive Future F Acc	14,233	£14,752.94	£0.82	£11,618.31	1.8%	£3,134.63
Allianz Green Bond 12 M GBP	7	£7,061.98	£1,003.57	£7,466.53	1.1%	£424.55

All values above are correct as at the end of the previous working day

Your net worth

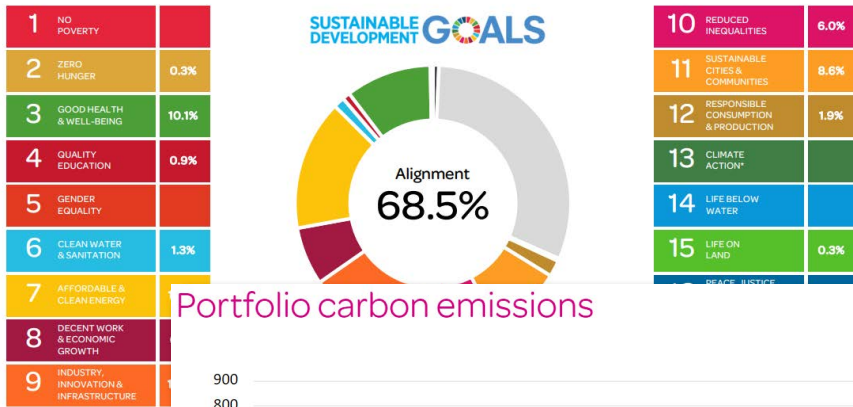
This summary of your current financial status lists what you own (assets) and what you owe (liabilities), helps you monitor your net worth.



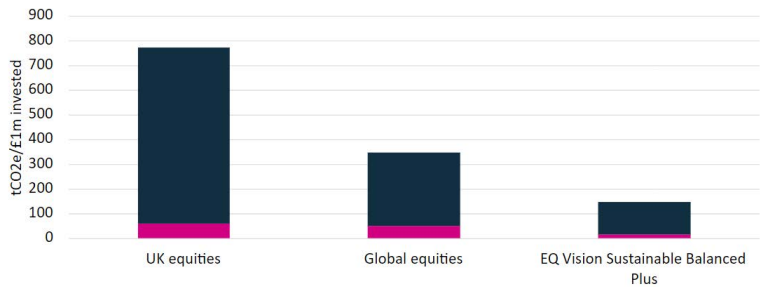
Reporting

We'll provide a breakdown of the sustainable characteristics your investments have made over the last twelve months.

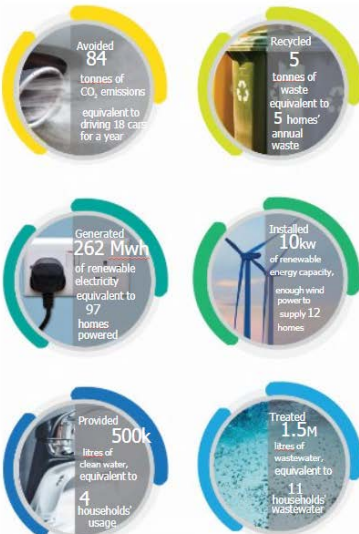
Portfolio alignment with the UN Sustainable Development Goals



Portfolio carbon emissions



Environmental impact




Social impact



Document store

As part of our efforts to minimise our impact on the environment, all your documents and reports are stored in electronic form in one place.



This quarterly update for the EQ Investors-Vision sustainable strategy showcases case studies from the three key pillars: Impact Solutions, ESG Leaders & Climate Focus.

Impact Solutions

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.

Impact Solutions

Extending the life of cystic fibrosis sufferers

Cystic fibrosis (CF) is a genetic disorder affecting the respiratory and digestive systems, leading to chronic lung infections and digestive problems. According to the Cystic Fibrosis Foundation, CF impacts approximately 105,000 people worldwide, with symptoms varying in severity. While advancements in treatment have improved life expectancy, the average lifespan for individuals with CF remains around 56 years. Some of the barriers to improving the life expectancy of CF sufferers include access to specialised care and expensive medications. Despite progress, the disease's complex nature demands ongoing research and support to enhance treatments and extend life expectancy.

FUND IN FOCUS
Janus Henderson US Sustainable Equity Fund

Janus Henderson — INVESTORS —

Vertex receives investments through the Janus Henderson US Sustainable Equity Fund, which invests in listed U.S. companies whose products and services have a positive environmental or social impact on the world. Other leading healthcare companies the fund invests in include Icon PLC, and Edwards Life Sciences Corp.

COMPANY

Vertex Pharmaceuticals

Vertex Pharmaceuticals is a biotechnology company focused on developing innovative therapies for serious diseases, particularly CF and other genetic disorders. Through cutting-edge research and drug development efforts, Vertex aims to improve patient outcomes and quality of life by addressing unmet medical needs in underserved areas.

Vertex Pharmaceuticals has significantly improved life expectancy for Cystic Fibrosis (CF) patients with its groundbreaking drug Trikafta. According to the Cystic Fibrosis Foundation, Trikafta has been shown to be highly effective in treating the underlying cause of CF, resulting in significant improvements in lung function and overall health. Studies have proven that patients treated with Trikafta experience reduced hospitalizations, and a better quality of life.

With its ability to address the underlying genetic mutation in approximately 90% of CF patients, Trikafta represents a major advancement in CF treatment. As a result, patients have seen remarkable increases in life expectancy, with some estimates suggesting that Trikafta could potentially increase the average lifespan of CF patients to approximately 82.5 years.



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or would like to discuss our services in more detail,
please contact us:



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Certified



Corporation

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