

Sustainable World Portfolios



#sustainableworld

Invest to achieve positive outcomes for the environment and society.

The EQ Sustainable World portfolios are managed with a dual mandate: to achieve long term capital growth by prioritising sustainability outcomes, investing through a multi-lens sustainability framework.

Sustainability issues are all around us and investors have a crucial role to play. The EQ Sustainable World strategy offers a diversified portfolio revolving around three key pillars: Impact Solutions, ESG Leaders & Climate Focus. These portfolios draw on the best ideas from EQ's investment team who have over 10 years of experience investing across these sustainable pillars.

Impact Solutions

Companies whose core products & services contribute towards progress on the UN Development Goals.

Objectives

Portfolios will achieve higher alignment to the UN Goals vs market benchmark*, and report on associated impact metrics.



ESG Leaders

Companies that are best at managing environmental, social and governance risks (ESG).

Objectives

Portfolios will achieve higher alignment to companies with low and negligible ESG risks vs market benchmark*.



Climate Focus

Companies showing climate leadership: climate solutions, low carbon leaders and those on a science-based transition.

Objectives

Portfolios will show increasing science-based climate target coverage in line with 100% by 2040.

Portfolios will achieve lower carbon footprint (Scopes 1,2,3) lower than market benchmark*.



Exclusions

All funds exclude ESG laggards and controversies, as well as controversial sectors.

Key features

- Globally diversified & risk managed multi-asset portfolios.
- Emphasis on stewardship underpins active ownership approach.
- Available on platform for ISAs, SIPPs and GIAs.
- Portfolio management fee: 0.32%–0.18% (excluding VAT) based on assets under management.
- Hybrid portfolios keep costs low – underlying fund charges: ~0.45%.



*Global equity market benchmark proxy: SPDR MSCI ACWI IMI

Stewardship strategy contributes to positive change

Our stewardship strategy shows the way that EQ contributes to impact. We realise that there is no perfect company or asset manager, and we use our influence through five key levers to affect change. This includes engaging with fund managers on their own voting & stewardship ambition, directly engaging with companies through collaborations and AGM attendance, and pushing for change across following strategic themes:

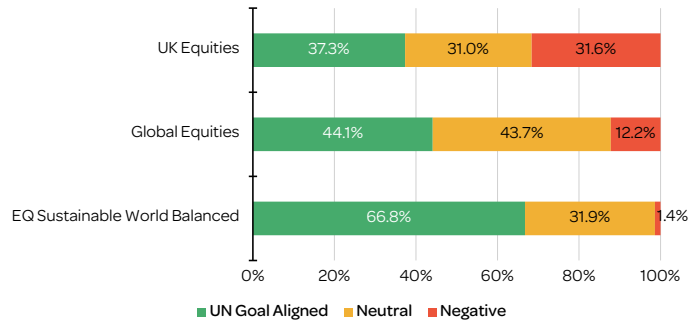


Investing for the UN Sustainable Development Goals

Our proprietary analytics looks under the bonnet of investment portfolios to show whether holdings are making positive contribution to the UN Goals. The chart below shows how Sustainable World compares with market indices:



Comparison data as at March 2023. Source: EQ.



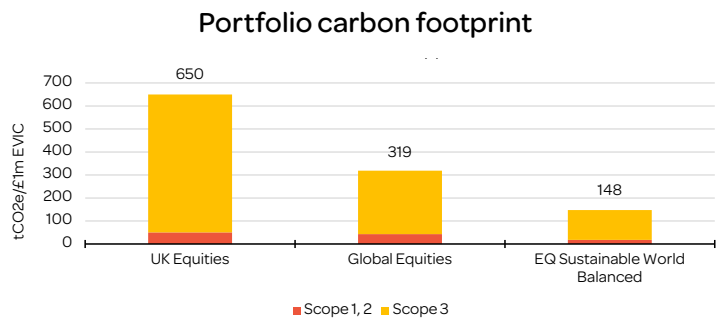
Source: EQ analysis, 2024.

Climate reporting

Climate change is a global issue, which our portfolios limit their contribution to. Our carbon footprinting and science-based target tracking helps us assess this, and align portfolios to global climate targets.



Independent verification by the Science Based Targets initiative offers a reliable way to judge whether businesses are serious about reducing their emissions over the long term.



Source: MSCI, January 2025.

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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