



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?

By partnering with a Discretionary Fund Manager (DFM), you can delegate the day-to-day management of your clients' investment portfolios, giving you more time to focus on their long-term financial planning goals.

Why choose EQ?

- ✓ Our goal is to deliver long-term growth and sustainable outcomes 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.
- ✓ Award-winning impact reporting, including carbon exposure analysis and sustainable development goal (SDG) mapping, helps your clients to connect their investments with their values.
- ✓ Our ambitious EQ stewardship strategy actively pushes for positive change in fund managers and underlying companies.
- ✓ 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 been recognised for best practices in sustainable investing.

- ✓ We invest in advanced research tools and high-quality data to identify the best funds and measure our impact effectively.
- ✓ We work in close partnership with fund managers to drive best practice across the industry.
- ✓ We align our due diligence to the leading industry standards and initiatives.



Model portfolios tailored to your clients' preferences



#futureleaders

For clients who want to invest responsibly at low cost

Multi-asset portfolios of passive/low cost funds: stronger ESG credentials, avoiding the most controversial activities

Prioritises lower cost and lower risk of performance divergence vs traditional benchmarks



#sustainableworld

For clients who want to invest broadly across multiple sustainability lenses

Multi-asset portfolios investing in active and passive funds across impact, ESG leaders and climate funds

Wants to consider the full spectrum of sustainable investments



#positiveimpact

For clients who want to invest in solutions to social & environmental challenges

Multi-asset portfolios of active funds running dedicated impact strategies

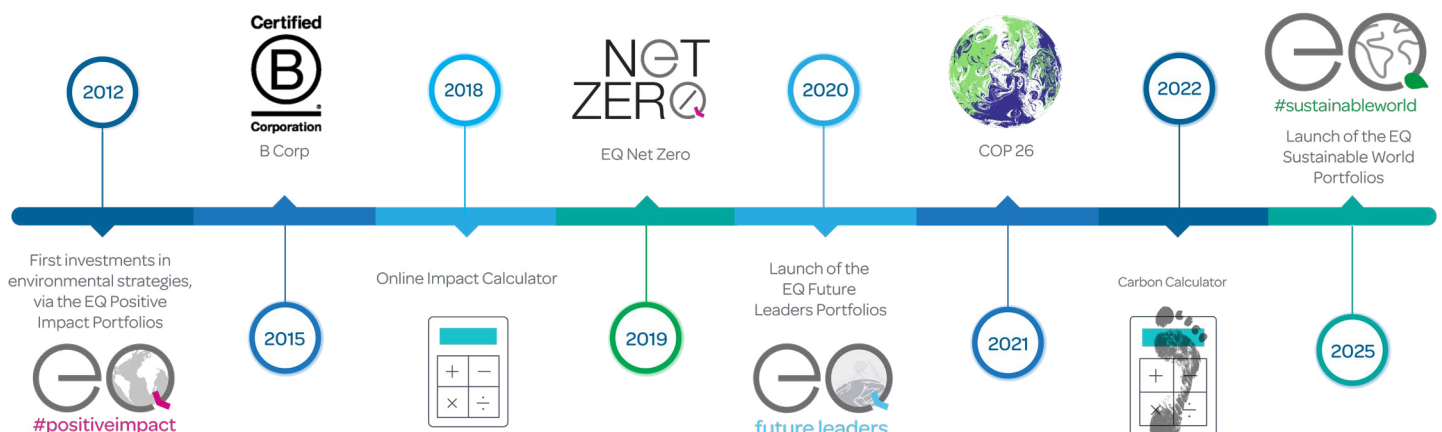
Wants to measure positive impacts, and avoid 20+ controversial activities due to high ambition

Our **Bespoke Service** is typically suited for high net worth clients, companies or charities 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

10-year+ track record

Our experience in sustainable investing goes back more than a decade. Our range of sustainable investment strategies reflects this, offering a solution for everyone. To download portfolio factsheets, visit: eqinvestors.co.uk/advisers





Mainstreaming sustainable investments since 2012

EQ's 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.
- ✓ In 2020 we launched Future Leaders – a new range of responsible, low-cost portfolios.
- ✓ In 2025 we launched Sustainable World – our latest range of sustainable globally diversified & risk managed multi-asset portfolios.

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 reports, please visit: eqinvestors.co.uk/advisers



EQ Investors, Centennium House, 100 Lower Thames Street, London EC3R 6DL

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

EQ Investors Limited ('EQ') is authorised and regulated by the Financial Conduct Authority (Ref. 539422). Company number 07223330. Registered in England & Wales, c/o Ampa Holdings LLP, Level 19, The Shard, 32 London Bridge Street, London SE1 9SG. EQ/1025/1144

