



Finding your sustainable  
DFM partner



A trusted partner for your  
clients' investments

# EQ investors

- ✓ A discretionary fund manager focused on sustainable and impact investing
- ✓ Building partnerships with adviser firms across the UK and around the globe
- ✓ Offering award-winning active, passive and bespoke investment solutions

## An outsourced investment solution

- ✓ Empowers adviser firms to serve their sustainable clients with credibility and integrity.
- ✓ Create bespoke solutions tailored to your sustainable wealth clients through collaborative portfolio design, where your firm's insights meet our sustainable investing acumen.
- ✓ Designed to be straightforward, efficient and collaborative, delivering a sustainable MPS that feels like an extension of your own proposition.

## Why partner with EQ?

We help you build trust and connect your sustainable clients with their values.

- ✓ Our specialist team have deep expertise in managing portfolios across ethical, responsible, ESG, sustainable and impact target markets.
- ✓ We have built a strong track record of delivering both impact and performance through building diversified, multi-asset portfolios using high-conviction funds.
- ✓ We can protect your business from greenwashing risks and other rapidly evolving regulations including the FCA's Consumer Duty & SDR, fulfilling the necessary disclosure requirements.
- ✓ Our award winning bespoke reporting is designed to be personal, inspiring and creative, helping your clients connect with the positive change their portfolios are driving.
- ✓ We integrate seamlessly into your advisory practices and processes and are operationally set up to cater for third-party platforms or direct custody.



# Three paths to investment excellence:

## Ready-made MPS

Choose from three ready-made investment propositions:

- Future Leaders
- Sustainable World
- Positive Impact

Immediately available across over 25 adviser platforms

EQ branded reporting and marketing

Scalable fee rate applies

No minimum investment



## White-labelled MPS

White label one of our three ready-made MPS propositions:

- Future Leaders
- Sustainable World
- Positive Impact

Your company branded reporting and marketing

Case studies, bespoke webinars, commentaries, factsheets

Minimum starting AUM: £25m

Bespoke fee rate applied



## Bespoke proposition

Bespoke or co-manufactured proposition tailored to you across:

- Climate Solutions
- ESG Leaders
- Impact Solutions

Reflect your firms' brand and philosophy

Your company branded reporting and marketing

Regular meetings with the investment team

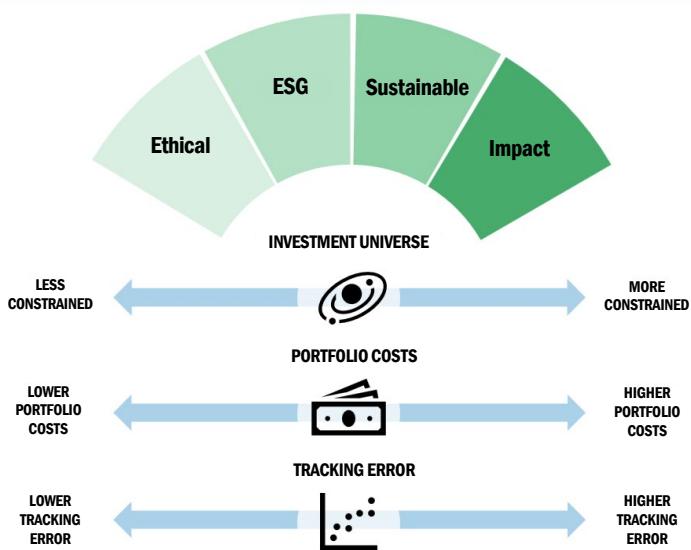
Minimum starting AUM: £50m

Bespoke fee rate applied

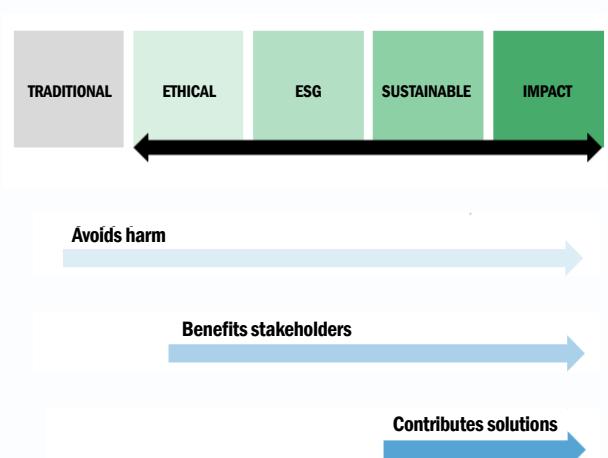


## Key considerations to building your proposition

### Defining your financial objectives



### Defining your sustainable objectives



## Why choose EQ



EQ is a founding certified B Corp and proudly holds one of the **highest B Corp scores among UK firms** - a testament to our commitment to doing business as a force for good.



At the heart of EQ is a belief that business decisions should consider **people, planet, and purpose**. Our staff and shareholders expect nothing less, and they hold us accountable for delivering on that mission which has been at the core of the business since it was created in 2014.



You can be sure that our investment philosophy is focused on sustainable strategies we believe in for the long term – ensuring your reputation is safe with us. We don't just talk about responsibility; we're built on it.

## 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.
- We have an ambitious stewardship and engagement strategy that drives for positive change.



If you have any questions about our investment service, please feel free to reach out to the team:



020 7488 7188



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[eqinvestors.co.uk/advisers](http://eqinvestors.co.uk/advisers)

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**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 originally invested.

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