

Sustainable investing for charities



*A fully outsourced investment solution for charity trustees
and investment committees*

Understanding your needs

EQ Investors (EQ) is a B Corp investment manager focused on sustainable investing. You can be confident that our qualified advice and investment approach ensure your charity's assets align with its values, support its goals, and enable trustees to fulfil their duties when making investment decisions.

- ✓ Our dedicated charity team takes full accountability for every aspect of your organisation's investments. We work closely with you to understand your charity's purpose and objectives, providing tailored investment solutions and an appropriate balance of assets.
- ✓ We take into account your charity's attitude to risk, financial position, liabilities, and cash flow needs – ensuring that your investments are fully aligned with your mission and long-term goals.
- ✓ We support you as trustees in making informed decisions, giving you increased confidence through ongoing advice and clear communication.

We report not only on financial performance but also use our in-house reporting to demonstrate that your charities assets are aligned with its stated purposes.

Investing for impact

We provide discretionary and advisory portfolio management services, built on an institutional grade, diversified, multi-asset, and multi-manager investment approach.

Our offering is distinguished by a specialist team with deep expertise in sustainable investing. This uniquely experienced group is dedicated to finding investments that align with rigorous impact and sustainability standards.

We go beyond surface-level screening. Our team cover the entire universe of available funds, conducting detailed analysis down to the company level. We not only look for alignment with sustainability goals but also for:

- ✓ Robust investment strategies,
- ✓ Proven fund manager ability, and
- ✓ A strong track record of delivering both impact and performance.

The result: We build portfolios using high-conviction funds that meet strict criteria, aiming to deliver strong returns and drive meaningful positive change.



Trustee & investment committee support

We understand that your principal duty is to further the charity's purpose - and that investment decisions must align with and support that mission.

We're here to ensure you as trustees or investment committee members not only meet your responsibilities, but also feel confident and supported throughout the investment journey:

- ✓ Ensuring investments are **suitable** and aligned with the charity's objectives.
- ✓ Maintaining **appropriate diversification** and prudent risk management.
- ✓ Considering **all relevant financial and non-financial factors**.
- ✓ Ensuring trustees act **within the powers** granted by the charity's governing document.
- ✓ Regularly reviewing the **investment policy** to reflect changes in financial position, cash flow, and liabilities.



You'll be supported by a **dedicated charities investment manager** who will build a strong relationship with your team. This ensures your charity's **mission, values, and financial needs** are fully understood - and translated into an investment strategy that reflects them.

We also provide:



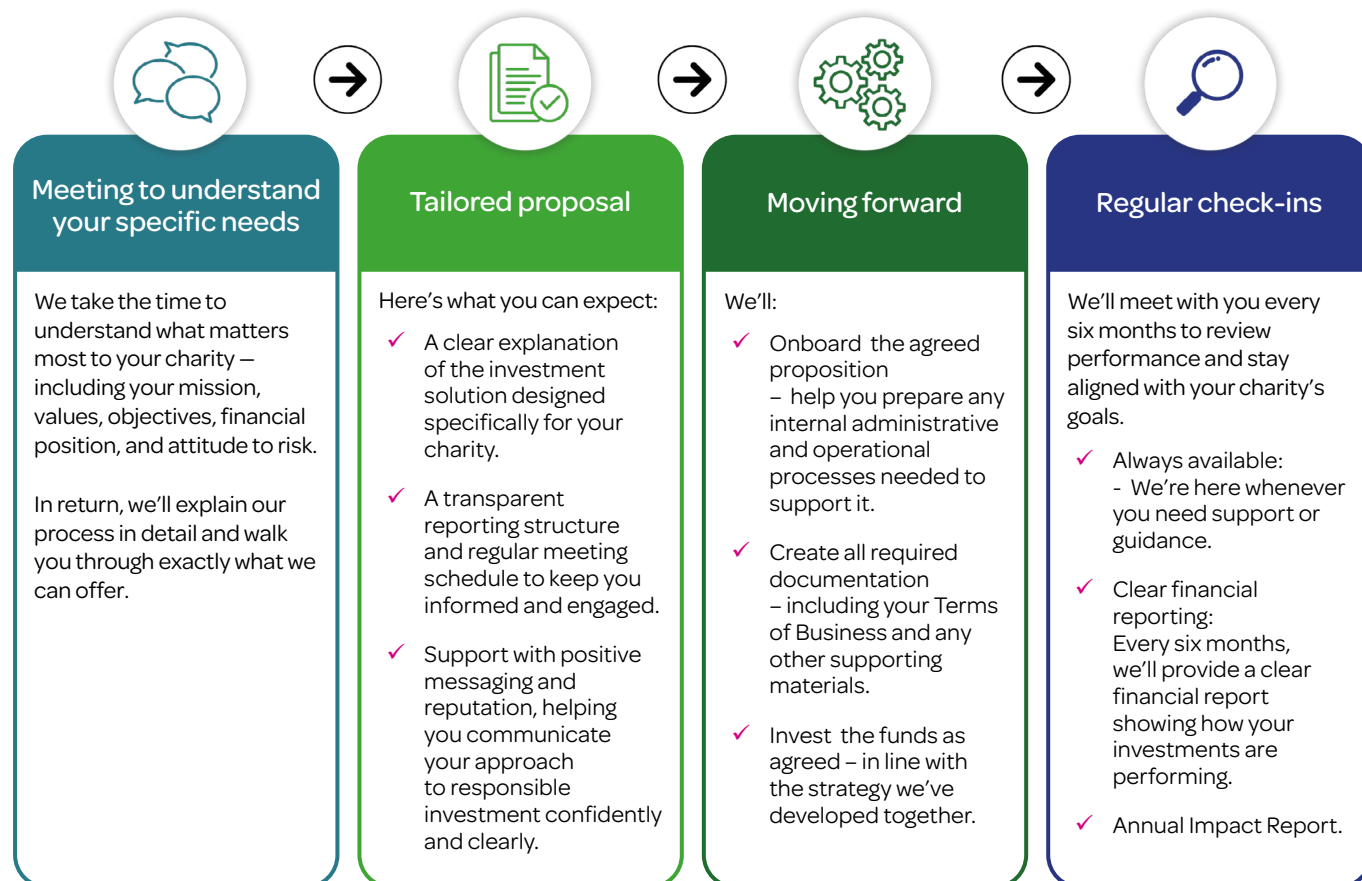
Expert guidance to help trustees develop or refine their sustainable investment policies.



Support for **charity staff in communicating** their investment approach and impact to stakeholders in a clear and compelling way.

With EQ, trustees can be confident they are making informed, responsible, and purposeful investment decisions. Our aim is to build a trusted, long-term relationship with your organisation.

Putting purpose into practice



Meaningful reporting

Our award-winning reports clearly outline both the **financial and non-financial returns** of your investments, illustrating how sustainable investing can be a powerful force for good. This strengthens the case for **sustainable investing** - not only as a sound financial strategy but as a meaningful way to contribute to a better future.

Reports are designed to be **relevant, personal, inspiring, and creative**, helping trustees connect emotionally and intellectually with the positive change their portfolios are driving.



SUSTAINABLE DEVELOPMENT GOALS



Why choose EQ?

EQ is a founding certified B Corp and proudly holds one of the **highest B Corp scores among UK financial services 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.



Twenty percent of our business is owned by a charitable foundation of which several colleagues are trustees we understand the operational and legal requirements first hand. You can be sure that our investment philosophy is focussed on sustainable strategies we believe in the long term that this is the right and successful way to invest and will mean that your reputation is safe with us.



We go the extra mile to use our influence as a force for good. We are pioneers in the impact and sustainability space using the investment arena to advance our aims to drive change via shareholder activism. We don't just talk about responsibility; we're built on it.



Meet our EQ charities team:



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



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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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