



Where money meets intelligence

 **CROSSING POINT**

TACTICAL INVESTORS

Green Path Portfolio ESG Fund Selection



**SME News Finance Awards 2021**

- Best ESG Investment Management Firm – Wales



**Wealth and Finance International, Ethical Finance Awards 2022**

- Best ESG Investment Management Firm – UK



## Our Commitment to ESG

Environmental, social, and governance (ESG) investing refers to a set of standards used by socially conscious investors in order to measure a company's impact on its surroundings and screen potential investments.

Our Green Path portfolios are committed to ensuring that the funds we invest in have limited impact on the environment, adhere to social criteria concerning how a company manages its relationships with employees, customers, and their communities, as well as ensuring the company is well governed through reviews of its leadership, audits, and other internal controls.

To do this, we use Sustainability ratings from Morningstar and MSCI, two well-established and well-respected ratings agencies. Morningstar gives each fund a sustainability rating of 1 to 5 globes by reviewing the ESG scores for the individual companies in which the funds invest. Funds selected for our Green Path portfolios carry a rating of 4 or 5 globes.\* MSCI ESG ratings range from AAA to CCC. Funds selected for our Green Path portfolios have ratings which range from BBB to AAA.\*\*

Fund	ISIN	Morningstar Globes	MSCI Rating
Liontrust Sustainable Future Global Growth	GB0030030067	5	AA
Schroder Global Sustainable Value Equity Fund I Capitalisation	GB00B019KQ13	5	AA
Ninety One Global Sustainable Equity	GB00B01VDL32	5	AA
Stewart Investors Indian Subcontinent Sustainability Fund	GB00B1FXTG93	5	BBB
iShares MSCI EM ESG Enhanced UCITS ETF USD (Acc)	IE00BHZPJ239	4	A
Stewart Investors Global Emerging Markets Sustainability	GB00B64TS998	4	A
ishares MSCI USA SRI UCITS ETF	IE00BYVJRR92	5	AA
Legg Mason ClearBridge US Equity Sustainability Leaders Fund	IE00BZ1NPT63	5	A
UBS SPDR S&P 500 ESG Leaders UCITS ETF	IE00BHXMR72	4	A
Royal London Sustainable Leaders Trust	GB00B7V23Z99	5	AA
UBS MSCI UK IMI Socially responsible UCITS ETF	IE00BMP3HN93	5	AA
Artemis Income Acc GBP	GB00B2PLJH12	4	AA
iShares MSCI Europe SRI UCITS ETF EUR (Acc)	IE00B52VJ196	5	AAA
JPMorgan Europe Sustainable Equity Fund	GB00B235HP90	4	AA
iShares MSCI Japan GBP Hedged UCITS ETF	IE00B7XYN974	4	AA
iShares Sustainable MSCI Japan SRI EUR Hedged UCITS ETF	IE00BYVJRR92	4	AAA
UBS MSCI Pacific Socially Responsible UCITS ETF	LU0629460832	5	AAA
Fidelity Sustainable Asia Equity Fund W-Acc	GB00B84Q8M70	4	A
Guinness Sustainable Energy	IE00BFYV9L73	5	AA
Pictet Clean Energy	LU0448836949	5	AA
M&G UK Global Listed Infrastructure	GB00BF00R928	5	AA
Sarasin IE Sustainable Global Real Estate Equity	IE00B8G43R93	5	NA
Pictet Asset Management Timber	LU0448837087	5	A
Pictet Asset Management Water	LU0448836600	4	AA
Royal London Short Term Money Market	GB00B8XYQ86	0	AA
Pimco GIS Climate Bond Fund Institutional GBP Acc	IE00BLH0Z268	5	AA
Rathbone Ethical Bond Fund I Acc GBP in GB	GB00B77DQT14	4	AA
Janus Henderson Strategic Bond Fund G Acc	GB00BLCYFX43	4	A
Pimco Global Investment Grade Credit ESG Fund GBP (Hedged)	IE00BDTMDT74	4	A
Vanguard U.K. Short-Term Investment Grade Bond Index Fund	IE00B9M1BB17	4	AA
Artemis Target Return Bond Fund I GBP Acc	GB00BJXPPH66	4	A

These ratings are all from the Morningstar and MSCI websites as of 07.08.23.

\*Royal London Short Term Money Market Fund is unrated by Morningstar.

\*\*Sarasin Global Real Estate is unrated by MSCI.