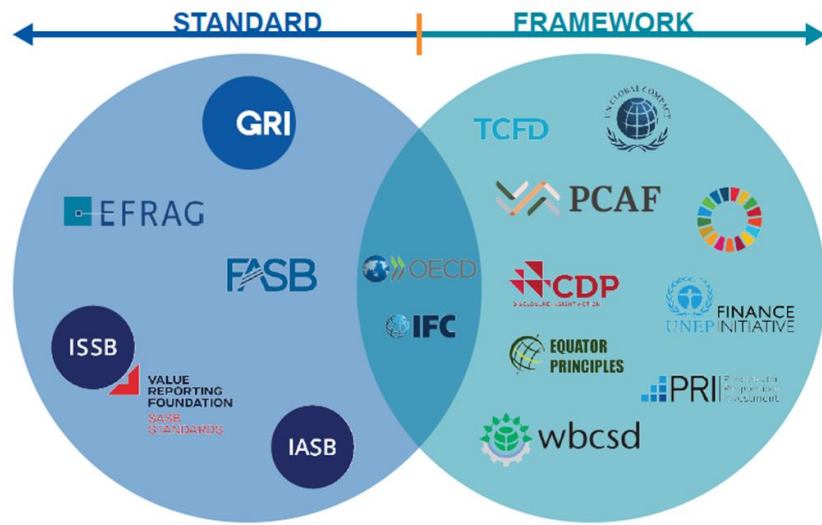


'Good' ESG



ESG investing actively selects companies that meet specific environmental, social and governance requirements.

There is no generally accepted standard defining what those requirements are.

Image via OneTrust

CharitySRI – helping charities invest responsibly

www.charitysri.org.uk



Getting started

Key topics, 60 second guides, Resources and Reports

Tailored advice blocks & Case Studies

Charity-specific pooled funds

2021: 47 funds, 19 providers, £19.4 billion

- 74% of funds have a tobacco screen
- 67% of funds have additional screens
- 30% of funds have a positive screen/explicit positive investing policy

Charity-specific pooled funds

- Product providers v individual products
- Direct and indirect holdings
- Ability to influence policy/engagement/voting
- Financial institution holdings
- Challenging greenwashing

Charity UK Equity ESG Fund

“excludes direct investments in companies or issuers which do not comply with the Fund’s ESG Policy, including companies or issuers that derive more than a specific proportion of their turnover from certain products and services, including tobacco, armaments*, pornography, alcohol, gambling, certain environmentally damaging activities and high-interest lending”

* any company which is engaged in military related activity and/or conventional armaments where the company’s annual turnover in relation to such activities exceeds 5% of the company’s latest annual turnover, or, if the company is part of a group, 5% of the group’s latest annual turnover.

Charity UK Equity ESG Fund

Top 10 Holdings as at 31 August 2022

Astrazeneca PLC

Shell PLC

RIO TINTO PLC

Standard Chartered PLC

Prudential PLC

Blackrock Growth and Recovery Fund*

RELX PLC

Reckitt Benckiser Group PLC

Unilever PLC

Rentokil Initial PLC

*Qinetiq Group PLC is in the top 10 holdings of this fund as at 31/08/22

Be part of pushing for 'Good' ESG

General questions to ask and issues to raise.

Use pooled fund report and the issues highlighted to engage with product providers.

Charity-specific funds could be pioneering the shift to a finance system that serves people and planet. The billions invested in these funds could be a force for positive change.

Thank you

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