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3D Investing: Licenced Funds













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Fund	Star Rating	Summary
ASI Global Equity Impact		Mixes ESG with a clear focus on positive impact in line with the UN Sustainable Development Goals.
Baillie Gifford Positive Change		A concentrated impact fund with sophisticated impact reporting and an exposure to emerging markets
Fidelity Sustainable Water & Waste		Has a pure focus on water and waste and also seeks above average ESG performance whilst reporting on key impacts.
Hermes Global Equity Impact Opportunities		8 core impact themes with incorporation of ESG and active engagement
Impax Environmental Markets PLC		A specialist, small & mid cap global environmental solutions fund
Jupiter Global Sustainable Equities		Low carbon global fund with fully integrated ESG. Clear focus on business practices and positive impact.
Kames Global Sustainable Equity		This fund is distinctive for its focus on investing in positive change.
Liontrust Monthly Income Bond		A relatively high monthly income and demonstrates a preference for companies with strong ESG credentials.
Liontrust Pan European Growth		This fund is a leader amongst sustainable European equity funds and is the Euro denominated version of the fund.
Liontrust SF Cautious Managed		A mixed asset fund with a 60% allocation to global equities that benefits from good ESG management
Liontrust SF Corporate Bond		Like other ethical corporate bond funds, there is a high weighting in financials and a relatively low social impact but the fund benefits from strong ESG analysis.
Liontrust SF Defensive Managed		A mixed asset fund with a 45% allocation to global equities that benefits from good ESG management

Fund	Star Rating	Summary
Liontrust SF European Corporate Bond		One of only a few funds to provide exposure to European bonds with evidence of 'best of sector' ESG selection.
Liontrust SF European Growth		A leader amongst European equity funds
Liontrust SF Global Growth		A global equity fund which balances thematic investment with an ESG approach
Liontrust SF Managed		A mixed asset fund with a 20% allocation to fixed interest and the remainder in equities
Liontrust SF Managed Growth		A growth fund with freedom to invest without reference to asset allocation benchmarks
Liontrust SF UK Growth		Some themes evident as well as a best of sector approach
Liontrust UK Ethical		Similar to the SF UK Growth fund but avoids animal testing
M&G Multi Asset Sustainable Allocation		An 'all in one' fund combining multiple assets with 30% dedicated to impact equities and the rest undergoing an ESG screen.
M&G Positive Impact		A concentrated impact fund with a bespoke impact reporting app.
Montanaro Better World		A global equity fund with 6 core themes and a focus on impact
Ninety One Global Environment		A concentrated fund with a wholesale focus on environmental solutions and positive carbon impact.
Ninety One UK Sustainable Equity		A UK equity fund that is differentiated by its' positive impacts.

Fund	Star Rating	Summary
Pictet Global Environmental Opportunities		An environmental fund that seeks to keep within sustainable limits
Rathbone Ethical Corporate Bond		A UK corporate bond fund with rigorous exclusion criteria and a small amount in charity bonds
Rathbone Global Sustainability		A high conviction fund that combines ethical screening with a thematic approach based on the Sustainable Development Goals
Sarasin Responsible Corporate Bond		A UK corporate bond fund with a clear thematic approach
Sarasin Responsible Global Equity		A large cap fund which combines a thematic approach with ethical exclusions and ESG integration.
Sarasin Sustainable Equity - Real Estate Global		An open ended fund investing in global property shares with good ESG management
Storebrand Global ESG Plus		An indexed global equity fund that incorporates rigorous climate change criteria
TM Home Investor		Invests in residential property at the lower end of the affordability spectrum and with specific sustainability criteria
Triodos Global Equities Impact		A global equity fund investing in large cap stocks with a 'best of sector' approach
Triodos Pioneer Impact		A thematic fund investing in multiple social & environmental themes
UBAM Positive Impact Emerging Equity		An emerging market equity fund which invests in impactful companies and measures the impact
UBAM Positive Impact Equity		A concentrated impact fund that benefits from a partnership with the Cambridge Institute for Sustainability Leadership

Fund	Star Rating	Summary
VT Gravis Clean Energy		A clean energy fund largely investing in clean energy infrastructure
Wellington Global Impact		One of the earlier impact funds with significant emerging markets exposure.
Wellington Global Impact Bond		Each bond has a direct positive social impact and this is substantiated through a comprehensive impact report.
WHEB Sustainability		A thematic equity fund investing in sustainability themes with excellent impact reporting



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