

Waverton is an independent investment management house dedicated to providing a high quality service for financial advisers, private clients, charities and institutions.

Our approach is to work in partnership with you, and we align with your business to find the best solution for your clients.

With regards to ESG, we are strongly of the view that relying solely on screening services or ready-made indices to manage exposures can lead to unreliable outcomes. As ESG investment continues to evolve, it is becoming increasingly apparent that fully-informed investment decisions require in-depth understanding of a company's business model, an acknowledgement of a period of transition and an assessment of its direction of travel. The consideration of ESG factors is not a separate process but an integral part of our detailed fundamental research and forms a natural part of our direct dialogue with companies around the world. We apply the same principles to our selection of other asset class securities and third party funds.

Waverton's predominantly direct, active and concentrated investment approach lends itself to the clearer identification and monitoring of risks (and opportunities), providing clients with greater transparency around their investments. All stocks we recommend for ownership in client portfolios meet our fundamental investment criteria. From an ESG perspective, this incorporates companies already operating to high standards, as well as those on an improving trajectory and/or part of the transition solution. The last two of these are often where most value is to be found.

We are delighted to sponsor this report from ESG Accord and would welcome the opportunity to further discuss your client's needs with you.

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