

# INVESTING TO SECURE TOMORROW

## INTRODUCTION

At Sarasin and Partners, we take a global, thematic approach to investment, finding opportunities within the powerful themes shaping the world of tomorrow. We believe that responsible companies make better investments. That's why we embed stewardship into our investment process.

We invest on behalf of charities, individuals, intermediaries and institutions. Operating as a partnership, our interests are aligned with yours. For more than 35 years, investors from around the world have trusted us with managing their assets, which now amount to £21 billion\*.

\* As at 31 December 2021

## PROUD TO PARTNER WITH ESG ACCORD AND SPONSOR THE 2022 DUE DILIGENCE REPORT

Investors' desire to make a positive difference has driven huge inflows into sustainable investments and triggered a proliferation of funds that claim to have responsible investment approaches. We believe independent, standalone reports are key to helping drive that positive change by raising trust and transparency, reducing the risk of investing in inappropriate funds, and making it easier to recommend ESG products.



## PASSIONATE ABOUT RESPONSIBLE STEWARDSHIP

Our goal is to grow and protect our clients' capital in a way that is aligned with a sustainable society. Environmental, Social and Governance analysis is integral to our investment process and approach to fundamental analysis and we look beyond financial performance to consider environmental, social and governance factors.

We have fully integrated ESG across our investment processes: from idea generation in long-term thematic trends such as climate change and automation, to stock selection that incorporates bottom-up ESG and climate impact analysis and in portfolio construction, where we decide our engagement plans.

## OUR RESPONSIBLE STEWARDSHIP APPROACH IS BUILT ON THREE PILLARS:

1

A robust, thematic, global investment process focused on long-term value drivers

2

Active engagement with the companies we invest in and considered voting, to drive positive change on your behalf

3

Policy outreach where we believe we can play a positive role in shaping markets and regulation

Our stewardship work and our thematic investment philosophy draw on each other. Our five megathemes mean we invest in long-term trends that have the power to improve societal welfare.

## A RANGE OF MULTI-ASSET SOLUTIONS FOR YOUR CLIENTS

Our Model Portfolios benefit from our distinct global thematic investment process, which identifies trends which are shaping the world in which we live and invest. Our Responsible Model Portfolios go beyond simple exclusions and measure ESG issues using our Suitability Investment Matrix.

Our Model Portfolios can be found on FE Transmission which gives you access to all of the underlying holdings data of the model portfolios your clients are invested in. This information can then be integrated into your due diligence, portfolio selection and reporting.

For more information on how we are working to help secure tomorrow, visit our latest thinking or get in touch.

### IMPORTANT INFORMATION

**This document is for investment professionals only and should not be relied upon by private investors.**

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The investments of the Model Portfolios are subject to normal market fluctuations. **The value of the investments of the Model Portfolios and the income from them can fall as well as rise and investors may not get back the amount originally invested.** If investing in foreign currencies, the return in the investor's reference currency may increase or decrease as a result of currency fluctuations. **Past performance is not a guide to future returns and may not be repeated.**

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