



CASTERBRIDGE

SUSTAINABLE IMPACT PORTFOLIOS

MAKING A POSITIVE IMPACT

You CAN invest for a better world

Building wealth and planning for the future is important, but you can also make sure your investments stay true to your own values. Now more than ever, people want to see decisive action taken on issues such as healthcare, climate change, renewable energy, equality, poverty, clean water and sanitation. The good news is that you no longer have to sacrifice your investment returns to do so. In fact, your money can have a positive and lasting impact on society.



THE SUSTAINABLE IMPACT PORTFOLIO

Your Sustainable Impact Portfolios

We start by thinking about how to manage risk and preserve your capital. We then look for strong returns by finding 'impact investments' that offer solutions to the world's greatest challenges.

Your well-diversified investment

The Sustainable Impact Portfolios may be suitable if you are prepared to hold your Investment for more than five years. Your portfolio may hold a blend of active and passive funds from some of the world's leading Environmental, Social and Governance (ESG) fund managers.

Your responsible investment manager

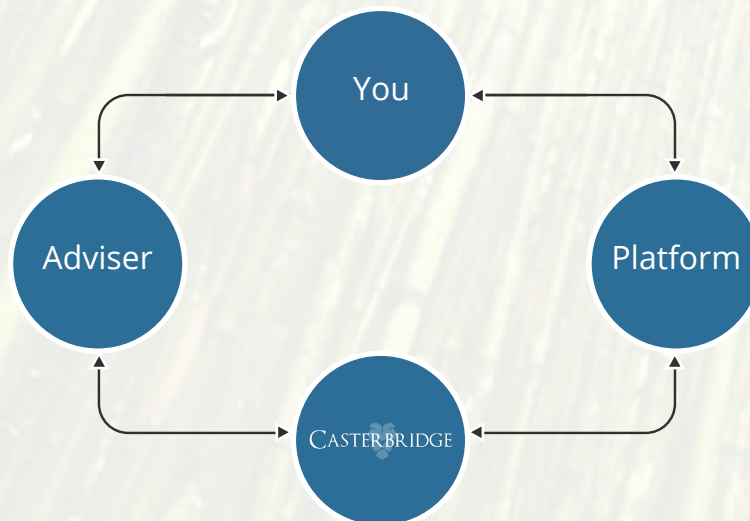
At Casterbridge Wealth, we believe sustainable investing is an approach that should be applied across all our investment portfolios. We do this as it helps us to keep delivering superior investment outcomes for our investors, and because it's the responsible thing to do.

WORKING IN TRUE PARTNERSHIP

We work closely with your financial adviser to achieve the right investment outcomes for you. Our Sustainable Impact Portfolios ensure your money is invested in the best possible way to help it grow and meet your financial goals and dreams. Investing in Our Sustainable Impact Portfolios is a long-term relationship between you, your financial adviser and us.

What is Discretionary Investment Management?

We assemble and manage a diversified portfolio of ESG investments. These investments take into account such important aspects as your investment objectives, broad ESG preferences and the level of risk you are comfortable taking. Following discussions between you and your financial adviser, they will determine which Sustainable Investment Portfolio is most suitable for you.



THE KEY BENEFITS OF OUR SUSTAINABLE IMPACT PORTFOLIO

Working together with your financial adviser

We have designed and built three investment portfolios within the Sustainable Impact Portfolio range. Each is intended for different levels of risk, enabling your financial adviser to select the portfolio that is most suitable for your current needs. This gives them the flexibility to change the selected portfolio as and when your personal needs change – our Sustainable Impact Portfolio range is designed to evolve with you and your requirements.



24-7 PORTFOLIO ACCESS

Whether you invest via our Direct Custody Service or via your chosen platform you can view your investments online 24 hours a day, seven days a week.



INVESTMENT EXPERTISE

Your investment gives you access to our Investment Managers and Research Team. All our resources are devoted to helping you achieve the best possible returns at all times.



DYNAMIC APPROACH

Investment markets often change rapidly. Our independent Investment Team can respond quickly, making important decisions on your behalf and finding the best available opportunities.



ESG IS CORE TO OUR BELIEFS

ESG shouldn't be about giving up return. We believe it's the opposite! We embrace the UN's Sustainable Development Goals to focus on meeting our planet's biggest challenges



ABOUT CASTERBRIDGE

We are an independent, multi award-winning discretionary fund management business, here to offer you choice and flexibility.

We were created by a passionate group of colleagues, committed to providing services to both current and future generations of clients.

We can assemble a diversified portfolio designed for your specific risk appetite and built to weather the rigorous tests of the market environment, now and in the future. We'll work closely with your financial adviser to understand your goals and your risk appetite.

For us, it's about achieving investment excellence while delivering the highest levels of service. But above all, it's about knowing what it takes to make your money work for you.



Keith Edwards, CEO & Chief
Investment Officer

*"We are truly active –
delivering the highest levels
of service and performance
is at the core of everything
we do."*

OUR ACTIVE APPROACH

Our ESG investment beliefs are based on a truly active approach, giving us opportunities to take advantage of market movements, and giving you the best chance to achieve your investment goals.

Embracing the United Nations' Sustainable Development Goals

We use the 17 UN Sustainable Development Goals to focus on areas where investment will have the greatest impact. We believe companies looking to achieve these goals are not only improving quality of life, but also have the best chance of performing well in the years to come.

No compromise on returns

We believe companies that set out to achieve a positive impact on society through one or more of the 10 sustainable impact themes highlighted by our Investment Team, are more likely to deliver a better investment return over the long term. Take healthcare as an example. As the global population grows and more people are living longer, the demand for healthcare rises dramatically.



Alongside the UN's Sustainable Development Goals, our Investment Team have identified 10 sustainable impact themes at the forefront of meaningful, positive change. These themes are:



Climate Change



Biodiversity



Renewable Energy



Poverty



Nutrition



Healthcare



Water



Sanitation



Equality



Collective Action

Covid-19, case in point...

Global emergencies such as the Coronavirus pandemic have demonstrated just how urgent the demand for medical drugs and emergency healthcare can be. Our Investment Team invests in companies looking to deliver innovation in healthcare services, particularly those finding new ways to prevent disease, providing more patient-centred care to the ageing population, and changing the way healthcare providers deliver their services to communities.



SUSTAINABLE IMPACT PORTFOLIOS

We understand the importance of creating ESG portfolios built to withstand difficult conditions. That's why you can be sure your money will be diversified across a wide selection of some of the world's leading fund managers, all within one investment portfolio.

The 17 United Nations' Sustainable Development Goals

"The Sustainable Development Goals are the blueprint to achieve a better and more sustainable future for all. They address the global challenges we face, including those related to poverty, inequality, climate change, environmental degradation, peace and justice. The 17 Goals are all interconnected, and in order to leave no one behind, it is important that we achieve them all by 2030."

Source: United Nations.

SUSTAINABLE DEVELOPMENT GOALS



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Important information

Casterbridge Wealth Limited is authorised and regulated by the Financial Conduct Authority (FCA).

Details of our authorisation are available on the FCA register under firm reference number 727583;

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