

# Sustainable Investing

Doing well by doing good

**Capital  
Partners**

PRIVATE WEALTH  
ADVISERS



ENRICH  
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LIVE

**“Aligning investor’s environmental  
& social priorities with their investment  
goals”**

# Approaches to Sustainable Investing

Passive approach | Use shareholder power to affect change

Integration approach | Choose companies with higher SRI ratings and reweight the portfolio

Impact approach | Put SRI impact above financial returns

# Approaches to Sustainable Investing

Value Driven

Values Driven

Conventional Investments	Passive Engagement	Sustainable Integration	Socially Responsible Investing	Impact Investing	Philanthropy
<ul style="list-style-type: none"> <li>• Maximise Financial Returns.</li> <li>• No consideration of environmental, social or governance (ESG) concerns.</li> </ul>	<ul style="list-style-type: none"> <li>• Encourages companies to engage in responsible behaviour.</li> <li>• No specific ESG screening.</li> </ul>	<ul style="list-style-type: none"> <li>• ESG integration.</li> <li>• Eliminates or reduces environmental and social impact.</li> <li>• Use of positive and negative screens.</li> </ul>	<ul style="list-style-type: none"> <li>• Customised portfolio construction.</li> <li>• Stock specific decisions on exclusions by client.</li> <li>• More difficult to achieve true diversification.</li> </ul>	<ul style="list-style-type: none"> <li>• Highly customised portfolio to target client goals.</li> <li>• Social issues a key target.</li> <li>• Return may be traded off against impact.</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on social outcomes.</li> <li>• Highly customised to client values.</li> <li>• Little or no consideration for investment return.</li> </ul>

Maximise Return



Balanced Returns with Social Outcomes



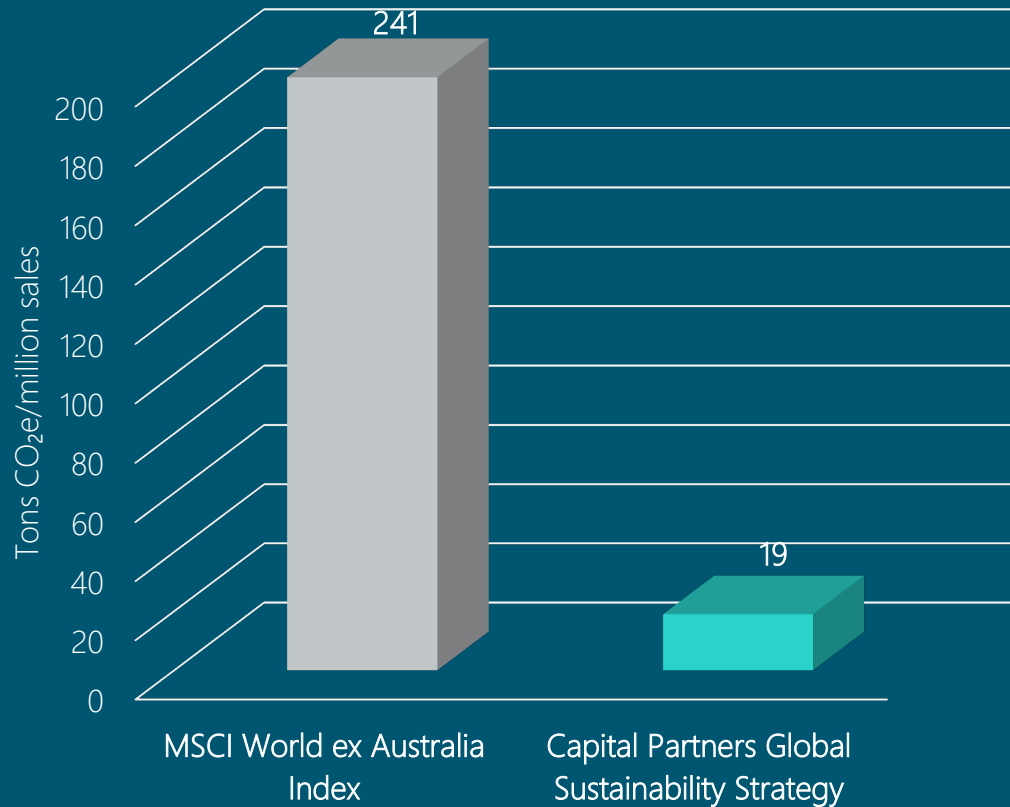
Maximise Impact

# Environmental, Social, Governance Screens

<p>Environmental</p> <p>Exclude or underweight top contributors to the following categories:</p>	<p>Social</p> <p>Companies connected to the below social issues may be excluded:</p>	<p>Governance</p> <p>Utilising active ownership to engage with companies:</p>
<ul style="list-style-type: none"> <li>• Greenhouse Gas Emissions Intensity</li> <li>• Potential Emissions from Reserves</li> <li>• Land Use and Biodiversity</li> <li>• Toxic Spills and Releases</li> <li>• Operational Waste</li> <li>• Water Management</li> </ul>	<ul style="list-style-type: none"> <li>• Factory Farming</li> <li>• Cluster Munitions and Landmines</li> <li>• Weapons control systems</li> <li>• Tobacco &amp; Alcohol</li> <li>• Child Labour</li> <li>• Gambling</li> <li>• Adult Entertainment</li> <li>• Personal Firearms</li> </ul>	<ul style="list-style-type: none"> <li>• Using shareholder voting power to advocate and promote better Corporate Social Responsibility (CSR) practices.</li> <li>• Excluding companies based on severe controversies.</li> </ul>

# Results from Sustainable Investing

### Greenhouse Gas Emissions Intensity



### Potential Emissions from Reserves

