

# Invest in the future

## ETHICAL AND ENVIRONMENTAL PORTFOLIOS

We offer two sets of investment portfolios built around ethical and environmental considerations. The portfolios are managed on a discretionary basis. We use our proven investment philosophy to manage the portfolios. A range of criteria guide the choice of funds used. Both sets of portfolios are available at a variety of risk levels.



### Ethically Conscious Portfolio

These portfolios consider a range of Environmental Social and Governance (ESG) factors. Funds have a low or zero tolerance to (for example) arms production, tobacco production, alcohol production, using child labour or operating in countries with repressive regimes.

These portfolios may be suitable for clients who want to invest allowing for a fairly wide range of general ethical factors.



### Environmental Focus Portfolio

These portfolios focus on environmental factors. They include companies involved in clean energy, water or sustainable waste. They also include companies assessed to have a low or positive environmental impact.

They may be suitable for clients who wish to have a low environmental impact. They may also be suitable for clients who wish to invest in companies positively affecting the environment and who believe that such companies may perform well by doing so.

# What will I be investing in?

## Screened funds

These funds allow managers to pick stocks and securities from a group of companies which pass filters based on Ethical, Social and Governance (ESG) criteria. Different funds apply different filters. All the funds we use have low or no exposure to tobacco, armaments and pornography production.

Some also filter for other criteria including gambling, alcohol production and geographic location.

## Thematic funds

These funds invest in companies which work in a field consistent with a specific theme. These themes will be based on a particular Ethical, Social or Governance concern for example sustainable water and waste management or renewable energy. The G&P specialists will include themes which are valuable from both an ESG perspective and also make strong investment cases. Funds chosen in a given theme will represent efficient and cost effective exposure to the theme.

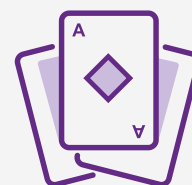
## INDUSTRIES WE AVOID



Manufacture of tobacco products



Manufacture of arms



Ownership of gambling facilities



## UN Sustainable Development Goals

We support the Sustainable Development Goals. We rate each fund against the UN Sustainable Development Goals. These alignments allow us to show you how well your portfolio supports these goals.

You will also be able to track the improvement of your portfolio against these Goals over time.

**For more information on our portfolios please get in touch**

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**IMPORTANT NOTES:** This is only a brief summary of the ethical approaches taken by Gale and Phillipson within Ethical DMP portfolios. We provide full details in a Service Description, which is available on request. The contents of this brochure do not constitute personal recommendations and do not take account of your individual needs, objectives or personal circumstances and should not be relied upon when making decisions or taking actions of any kind. You should talk with a financial adviser before making any investment decisions. **Your capital is at risk. The value of investments and the income from them may fall as well as rise and you may not get back the amount that you invest.** Gale and Phillipson Investment Services Ltd is authorised and regulated by the Financial Conduct Authority (Reference Number 431387) and trades under the name Gale and Phillipson. Registered in England and Wales numbers 05409822. Registered office: Gallowfields House, Fairfield Way, Richmond, DL10 4TB.