

Show Me the (Sustainable) Money Again

Investors that allocate capital to sustainability
transitions



Contents

Overview 3

abrdrn 4

Aegon Asset Management 5

AG2R LA MONDIALE GESTION D'ACTIFS (Asset manager) 6

AllianceBernstein 7

Allianz Global Investors 8

Amundi 9

AP310

Artemis Investment Management11

Aviva Investors12

Axa Investment Managers13

BlackRock (Investment Management)14

BNP Paribas Asset Management15

Caisse des dépôts et consignations (CDC) [Asset Manager]16

Calvert Research & Management17

Candriam18

Capital Group19

Columbia Threadneedle Investments20

Federated Hermes21

Impax Asset Management22

Janus Henderson Investors23

Jupiter Asset Management24

Lazard Asset Management25

Legal and General Investment Management26

Liontrust27

Lombard Odier Investment Management28

| | |
|--|-----------|
| M&G Investments [M&G] | 29 |
| MFS Investment Management | 30 |
| Mondrian Investment Partners | 31 |
| Nordea Asset Management | 32 |
| Norges Bank Investment Management | 33 |
| Pictet Asset Management | 34 |
| Pzena Investment Management | 35 |
| Redwheel | 36 |
| Robeco | 37 |
| Royal London Asset Management | 38 |
| Schroders Asset Management | 39 |
| State Street Global Advisors | 40 |
| Swedbank Robur | 41 |
| Thornburg Investment Management | 42 |
| UBS Asset Management | 43 |
| Vanguard Group (Investor) | 44 |
| Wellington Management | 45 |
| WHEB Asset Management | 46 |
| Zevin Asset Management LLC | 47 |

Overview

In 2021, WBCSD and SRI-Connect published the first Show Me the (Sustainable) Money guide to identify the "asset managers who put their money where their mouths are on sustainability".

This report profiles asset managers that manage sustainable thematic investment strategies that focus on social themes or the UN Sustainable Development Goals.

Recent developments

Since 2021, sustainability thematic and transition investment have experienced considerable flux as:

- Regulation has sought to define them as investment strategies ... but not yet finished the job
- Macro factors have veered from strongly supportive to significantly undermining of the investment case for sustainability-themed investment
- Client demand persists - although 'work-in-progress' on fund categorisation makes this nigh-on impossible to measure on a market-wide basis

Regulatory drivers

Regulation in the EU and the UK and guidance in the USA and Canada is being developed to give investors clarity over the objectives of sustainability funds, notably:

- 'Article 9' funds under the EU SFDR must have "sustainable investment as their objective"
- Sustainability Impact funds under the UK SDR - "directly pursue positive environmental or social outcomes or both through both the fund manager's investment activities and the sustainability characteristics of the assets." We note, however, that these regulations are still under development, under review and settling down. We anticipate greater clarity in 2025.

Investment fundamentals

The public health and renewable energy focus of 2018 – 2020 reversed into fossil fuel and defence outperformance of recent years which put sustainability thematic funds under considerable pressure. Together these trends have proven the case - beyond any doubt - that sustainability factors affect investment performance although the volatility has been challenging.

Client demand

Investors in sustainability transitions are - almost by definition - long-term investors. As classifications settle over the next six months, we anticipate that market-wide sizing of these strategies will again become possible.

Fund launches

Notable launches and developments over recent years include:

- A wide variety of climate-focused funds
- Biodiversity theme funds

Actions for companies

Companies can use this guide to target - with their communications - investors and the funds that are looking to allocate capital to companies that invest towards and deliver sustainability transitions.

Actions for investors

Investors who want to be featured in this report or to update their profile should contact mike.tyrrell@sri-connect.com

Sustainability solutions or transitions strategies

abrdn manages "sustainability thematic and impactful" funds including the following:

Emerging Markets SDG Equity Fund

... invests in "companies in Emerging Market countries which in our view will make a positive contribution to society through their alignment achieving the United Nation's Sustainable Development Goals ('SDGs')"

ASI Multi-Asset Climate Solutions Fund

... invests in "a diversified portfolio of equities and corporate bonds issued by companies whose core business is to offer products and services that enable the transition to a sustainable low carbon economy."

Global Equity Impact Fund

... invests in "companies that intentionally aim to create positive measurable, positive environmental and social impact"

Multi-Asset Climate Opportunities Fund

... invests in companies that "derive substantial revenues from products and services that enable the global transition to a sustainable zero carbon economy."

Thematic fund focus - Environmental

abrdn's environmental focus is based natural capital.
The firm's Climate Opportunities and Climate Impact funds are both environmentally-focused.

Thematic fund focus - Social

abrdn's social focus is defined by their social pillar, covering the rights and livelihoods of other, where their focus areas include:
Human rights & communities
Labour & employment
Diversity, equity & inclusion (DEI)
The Global Equity Impact Fund focuses on social impacts.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

abrdn's Emerging Markets SDG fund focuses on the UN SDGs.

Aegon Asset Management

Sustainability solutions or transitions strategies

Aegon runs the following sustainable thematic funds:

Aegon Global Sustainable Equity Fund

... invests in "innovative and disruptive companies that are providing solutions to today's sustainability challenges. This is a high-conviction growth-focused portfolio of 35-45 companies, with the theme of sustainability running through each position."

Aegon Global UK Sustainable Opportunities Fund

... invests in "predominately UK companies that are providing solutions to today's sustainability challenges. This is a high-conviction growth-focused portfolio of 35-45 companies, with the theme of sustainability running through each position."

Thematic fund focus - Environmental

Aegon's [Climate Transition Fund](#) is 'a simple, liquid, and transparent short-dated bond strategy which embeds proprietary climate transition research to direct investments to companies that have robust, credible plans to transition towards a low carbon economy and therefore are better aligned with investors' net-zero goals.'

The [Sustainable Opportunities](#) Fund invests 'in predominantly UK companies that are providing solutions to today's sustainability challenges. This is a high-conviction growth-focused portfolio of 35-45 companies, with the theme of sustainability running through each position.'

Thematic fund focus - Social

SRI-C has not identified any specific focus on social issues within Aegon's thematic funds or investment strategies.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within Aegon's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

Aegon AM offers the [Global Sustainable Sovereign Bond Fund](#). This aims to invest in "financially strong countries that contribute to the improvements in sustainability targets as defined by the UN Sustainable Development Goals (SDGs)."

AG2R LA MONDIALE GESTION D'ACTIFS (Asset manager)

Sustainability solutions or transitions strategies

SRI-C has not identified any thematic, transition or sustainability solutions strategies managed by this firm.

Thematic fund focus - Environmental

Not applicable - no thematic funds managed

Thematic fund focus - Social

Not applicable - no thematic funds managed

Thematic fund focus - Economic

Not applicable - no thematic funds managed

Thematic fund focus - UN SDGs

Not applicable - no thematic funds managed

AllianceBernstein

Sustainability solutions or transitions strategies

AB offers:

- [AB Sustainable Climate Solutions Portfolio](#)
- [AB China Net Zero Solutions Portfolio](#)

Thematic fund focus - Environmental

AB's Portfolio with Purpose invest in issuers that address environmental factors - such as climate - whether through their products, services or practices.

Thematic fund focus - Social

AB's Portfolio with Purpose funds invest in issuers that address social factors, whether through their products, services or practices. They consider the themes of:

- Health
- Empowerment

Thematic fund focus - Economic

The firm subdivides its 'Empowerment' theme into various socio-economic sub-themes, some of which are linked to broader economic prosperity and growth:

- Educational & employment services
- Financial security & inclusion
- Information & communication technologies
- Sustainable infrastructure

Thematic fund focus - UN SDGs

Product impact reports for AB's Portfolios with Purpose contain portfolio-level ESG metrics and disclose how portfolios align with the UN SDGs and other ESG frameworks.

Allianz Global Investors

Sustainability solutions or transitions strategies

AGI manages a number of thematic funds with sustainability themes including:

- Allianz Global Water
- Allianz Green Bond
- Allianz Green Transition Bond
- Allianz Smart Energy
- Allianz Sustainable Health Evolution

Thematic fund focus - Environmental

AGI's Clean Planet and Global Water funds focus on environmental themes.

Thematic fund focus - Social

AGI's Food Security Fund and Sustainable Health Evolution Fund focus on social themes.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.

Thematic fund focus - UN SDGs

AGI manages a number of equity, fixed income, multi-asset and private markets funds that target SDG alignment

Amundi

Sustainability solutions or transitions strategies

Amundi's sustainable thematic solutions products focus on:

- Environmental challenges
- Demographic and social challenges
- Technological revolutions

Thematic fund focus - Environmental

Amundi's environmental challenges 'solution' set contains multiple environmentally-focused funds, including but not limited to:

- **KBI Water Fund** ... a high conviction, equity portfolio of companies seeking to provide solutions to the challenges around the supply of clean water.
- **KBI Global Energy Transition Fund** ... a high conviction, equity portfolio of companies providing solutions to the growing demand for clean energy globally.
- **5 x climate funds** are also listed on the Amundi funds website, fund searches using terms such as healthcare, biodiversity, nature yielded no results. But Amundi offers a **Blue Economy** and **Circular Economy** fund.
- **2 x social funds** were found (**social impact bond; invest social impact**)

Thematic fund focus - Social

Amundi's demographic and social challenges 'solution' set contains multiple socially-focused funds, including but not limited to:

- ****CPR Invest - Food For Generations - ****... which seeks to contribute to the challenge of feeding the world's population.
- ****CPR Invest - Global Lifestyles - ****... which seeks to capture long-term consumer trends which are driven by major societal & demographic transformation.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the thematic funds managed.

Thematic fund focus - UN SDGs

****Amundi's CPR Invest - Climate Action fund ****invests in international equities committed to limiting impact of climate change in line with UN SDG 14.

AP3

Sustainability solutions or transitions strategies

SRI-C has not identified any thematic, transition or sustainability solutions strategies managed by this firm.

| | |
|--|-------------------------------------|
| Thematic fund focus - Environmental | Thematic fund focus - Social |
|--|-------------------------------------|

| | |
|-----|-----|
| N/A | N/A |
|-----|-----|

| | |
|---------------------------------------|--------------------------------------|
| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
|---------------------------------------|--------------------------------------|

| | |
|-----|-----|
| N/A | N/A |
|-----|-----|

Artemis Investment Management

Sustainability solutions or transitions strategies

The Positive Future Fund "invests in companies that have the potential to create transformational change."

Thematic fund focus - Environmental

While the Positive Future Fund focuses on "investing in companies which meet the manager's criteria for positive environmental and/or social impact", SRI-C could not find details on the specific focal themes.

Thematic fund focus - Social

While the Positive Future Fund focuses on "investing in companies which meet the manager's criteria for positive environmental and/or social impact", SRI-C could not find details on the specific focal themes.

Thematic fund focus - Economic

While the Positive Future Fund focuses on "investing in companies which meet the manager's criteria for positive environmental and/or social impact", SRI-C could not find details on the specific focal themes.

Thematic fund focus - UN SDGs

The Positive Future Fund reports on the contribution that its holdings make to the UN SDGs. For example:

- 31.1% of holdings contribute to SDG3: Good Health and Well-being
- 28.9% of holdings contribute to SDG9: Industry, Innovation and Infrastructure
- 8.0% of holdings contribute to** **SDG8: Decent Work and Economic Growth
- etc (Source: [Artemis Positive Future Fund](#))

Aviva Investors

Sustainability solutions or transitions strategies

Aviva offers a range of transition strategies across asset classes designed to deliver financial returns and positive outcomes for People, Climate and Earth. These funds include:

- Social Transition Global Equity Fund ... invests in companies globally that either provide solutions to social inequality or transitioning their business models to manage their social impact
- Natural Capital Transition Global Equity Fund ... invests in companies globally that either provide solutions to reduce biodiversity loss or are transitioning their business models to manage their impact on nature
- Climate Transition Global Equity Fund ... invests in companies globally that either provide solutions to climate change or orientate their business models to a low-carbon economy

Thematic fund focus - Environmental

Aviva's Natural Capital Transition Global Equity fund is environmentally-focused, with the following investment themes:

- Circular economy
- Climate action
- Sustainable ocean
- Sustainable land

Thematic fund focus - Social

Aviva's Social Transition Global Equity fund focuses on transitioning towards a more socially equitable economy, transition themes include:

- Respect human rights
- Promote decent work
- Responsible corporate behaviour
- Access to education
- Access to health
- Access to finance

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

Aviva's Sustainable Transition fund range targets opportunities linked to the United Nations SDGs.

A number of the funds offered by the company are aligned with specific goals.

Axa Investment Managers

Sustainability solutions or transitions strategies

Axa IM manages:

- ACT funds [which] are designed to create " long-term sustainable value for clients while driving meaningful change for society and the environment". As of the end of December 2023, this includes 25 funds and two ETFs, each investing with focus on Planet or People, or People and Planet.
- A range of equity and credit Paris Aligned Benchmark (PAB) ETFs launched in 2023 to cater to clients who wish to achieve their goals using the PAB framework within an ETF wrapper.

Thematic fund focus - Environmental

Axa's ACT funds are variously focused on different aspects of People and Planet.

Thematic fund focus - Social

Axa's ACT funds are variously focused on different aspects of People and Planet.

Thematic fund focus - Economic

Thematic fund focus - UN SDGs

BlackRock (Investment Management)

Sustainability solutions or transitions strategies

Through iShares, the BlackRock Sustainable Investing Platform offers four sustainable investment fund types.

Of these, the thematic range is comprised of 'targeted investments in issuers **whose business models** may not only benefit from but may also **drive long-term sustainability outcomes**'.

At the centre of the thematic investing philosophy are [5 'mega forces'](#):

- digital disruption and AI,
- a fragmenting world,
- low-carbon transition,
- demographic divergence and
- the future of finance.

Thematic fund focus - Environmental

BlackRock offers numerous funds focused on environmental themes including on clean energy, water, timber and forestry, copper miners, agribusiness, lithium batteries and electric vehicles.

Thematic fund focus - Social

BlackRock offers funds focused on specific social themes including: healthcare, inclusion and diversity and aging populations.

Thematic fund focus - Economic

Funds with an economic focus include those targeting digital security, blockchain technology, automation and robotics, and consumer growth.

Thematic fund focus - UN SDGs

The firm offers the [iShares MSCI Global Sustainable Development Goals ETF](#).

BNP Paribas Asset Management

Sustainability solutions or transitions strategies

BNP Paribas Asset Management run multiple sustainability-themed funds. These include:

- [Climate change - EUR](#)
- [Quant Europe Climate Carbon Offest Plan - EUR](#)
- [Energy Transition](#)
- [Health Care Innovators](#)
- [Smart Food](#)

Thematic fund focus - Environmental

BNP Paribas AM manages multiple environmental thematic funds covering companies focused on:

- Climate Change
- Healthy Ecosystems
- Energy Transition

Thematic fund focus - Social

The BNP Paribas Health Care Innovators aims to capture compelling growth opportunities across key healthcare themes. Specifically, the fund invests in companies which are driving or directly benefiting from healthcare innovation, such as, but not limited to, advances in genetic sequencing, drug delivery, miniaturisation, bio-compatible materials, haptics, and healthcare information technology.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

SRI-C has not been able to identify any specific focus on the UN SDGs within the firm's sustainability thematic funds or strategies.

Caisse des dépôts et consignations (CDC) [Asset Manager]

Sustainability solutions or transitions strategies

While a number of CDC subsidiaries offer thematic sustainability funds across a range of asset classes, SRI-C could not identify specific thematic funds managed by CDC's asset management division.

| Thematic fund focus - Environmental | Thematic fund focus - Social |
|-------------------------------------|-------------------------------|
| N/A | N/A |
| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
| N/A | |

Calvert Research & Management

Sustainability solutions or transitions strategies

Calvert offers a water fund and an energy solutions fund.

Thematic fund focus - Environmental

Calvert's Water fund invests in companies in the following sub-sectors:

- Water Infrastructure Providers
- Water Use Leaders/Water Innovators
- Water Technology Providers
- Water Utilities

The firm's energy solutions fund invests in:

- Energy Use Leader/Energy Innovators
- Energy Technology Providers
- Renewable Energy Producers/Distributors
- Energy Efficiency Providers

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - Social

SRI-C has not identified any specific focus on social issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

Calvert's responsible allocation models do not appear to mention the SDGs.

Candriam

Sustainability solutions or transitions strategies

Candriam identifies seven themes for investment:

- Future mobility
- Fight against cancer
- Circularity
- Climate change
- Demographics
- Metaverse
- Robotics and technology

In terms of impact investing, Candriam invests in private equity funds that have 'defined clear and measurable social or environmental impact objectives, or through our bond management, by choosing to invest in sustainable corporate or government projects'

Thematic fund focus - Environmental

Candriam manages two funds with an environmental theme:

- **Circular Economy** strategy and
- **Climate Action** fund.

Thematic fund focus - Social

Candriam offers three funds with an identifiable social focus:

- An **Equities L Oncology Impact** strategy
- A **Sustainable Equity Children** fund
- A **Demographics** fund.

Thematic fund focus - Economic

With an economic focus, Candriam offers:

- a **Robotics and Technology** fund
- an **Essential infrastructure** fund

Thematic fund focus - UN SDGs

Candriam notes that "Our approach is firmly entrenched in the framework drawn up in 2015 by the United Nations' **17 Sustainable Development Goals (SDGs)**, which lays out key factors to be taken into account by the financial community to alleviate poverty and inequalities while combating climate change and environmental deterioration." Certain funds eg social bond, incorporate SDG criteria.

Capital Group

Sustainability solutions or transitions strategies

The **Sustainable Global Opportunities** fund "is a global, multi-thematic equity fund that invests across multiple sustainable investment themes, mapped to the United Nations Sustainable Development Goals (UN SDGs)."

Thematic fund focus - Environmental

Capital Group's seven investment themes include four environmental themes:

- Energy Transition
- Sustainable cities & communities
- Responsible consumption
- Clean water & sanitation

Thematic fund focus - Social

Capital Group's seven investment themes include three social themes:

- Education & information access
- Financial inclusion
- Health & well-being

Thematic fund focus - Economic

Capital Group's thematic funds and research focus on economic issues like healthcare advancements, technological innovations, and the impacts of geopolitical events.

Thematic fund focus - UN SDGs

Capital Group's multi-thematic approach is centered around themes which are mapped to the UN SDGs.

Columbia Threadneedle Investments

Sustainability solutions or transitions strategies

In addition to the 'Article 9' funds CTI run 4 'Net Zero Transition' funds.

| Thematic fund focus - Environmental | Thematic fund focus - Social |
|-------------------------------------|------------------------------|
|-------------------------------------|------------------------------|

Focus areas include:

- Energy and climate transition;
- Sustainable resource management and
- Transformation.

Social themes of focus include: Health, well-being, food and security; Education & training; Community formation and support.

| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
|--------------------------------|-------------------------------|
|--------------------------------|-------------------------------|

Economic themes of focus include: Financial and technological inclusion; Inclusive work and economic development; Regeneration & infrastructure.

"Translating the UN Sustainable Development Goals (SDGs) to investment opportunities provides us, our clients, and the wider industry, with a compelling means to contribute to sustainable development whilst aiming to achieve positive financial returns."
CTI offers an SDG Engagement Global Equity fund.

Federated Hermes

Sustainability solutions or transitions strategies

The firm offers the [Global Equity Low Carbon fund](#) - A diversified strategy that avoids fossil fuels and favours firms that are managing and mitigating their contribution to climate change and supporting the low-carbon transition.

Thematic fund focus - Environmental

Federated Hermes focuses on several environmental issues within their thematic funds and research including:

- Biodiversity Conservation
- Resource Efficiency
- Climate Change Mitigation

Federated Hermes' Impact Opportunities Equity Fund requires companies to provide positive impact towards one of the team's nine themes, which include 3 environmental themes:

- Energy Transition
- Circular Economy
- Water

Federated Hermes' Biodiversity Equity fund is built on a thematic framework of six SDG-aligned investable themes consisting of:

- Marine pollution
- Land pollution
- Unsustainable living
- Unsustainable farming
- Deforestation
- Climate Change

Thematic fund focus - Economic

This firm focuses on various economic issues within its thematic funds including:

- Inclusive Growth
- Sustainable Infrastructure
- Innovation and Technology
- Circular Economy
- Supply Chain Resilience
- Long-term Economic Stability

Thematic fund focus - Social

Federated Hermes integrates social considerations into its thematic funds and research, aligning with specific United Nations Sustainable Development Goals (SDGs) as follows:

SDG Engagement Equity Fund:

- No Poverty (SDG 1)
- Zero Hunger (SDG 2)
- Good Health and Well-being (SDG 3)
- Quality Education (SDG 4)
- Gender Equality (SDG 5)
- Clean Water and Sanitation (SDG 6)
- Decent Work and Economic Growth (SDG 8)
- Reduced Inequalities (SDG 10)
- Sustainable Cities and Communities (SDG 11)
- Peace, Justice, and Strong Institutions (SDG 16) This strategy seeks to generate positive societal impact alongside financial returns.

Sustainable Global Equity Fund:

- Social Inclusion
- Health and Well-being The fund applies exclusions for activities potentially harmful to sustainable outcomes, such as weapons, fossil fuels, alcohol, gambling, and tobacco.

Impact Opportunities Fund:

- Food Security
- Health and Well-being It seeks to invest in companies that can deliver quantifiable positive impacts, supporting global prosperity.

Thematic fund focus - UN SDGs

A number of the thematic funds offered by Federated Hermes seek alignment with the UN SDGs.

Notably the SDG Engagement Equity Fund aims to generate positive societal impact by aligning investments with the United Nations Sustainable Development Goals (SDGs). This fund seeks to engage with companies to encourage practices that contribute to these global objectives".

Impax Asset Management

Sustainability solutions or transitions strategies

Impax's whole product invests in "the transition to a more sustainable economy". A full list of the investment strategies and funds managed by the firm can be viewed here: [Impax / Product Finder](#).

Thematic fund focus - Environmental

Focus areas include:

- Climate change
- Circular economy
- Access to clean water

Thematic fund focus - Social

Social themes of focus include:

- Well being and nutrition
- Access to finance
- Access to healthcare
- Equitable connectivity

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.

Thematic fund focus - UN SDGs

"Impax's investment process does not analyse alignment with SDGs as an investment objective or component of portfolio construction. Instead, we use the SDG framework to understand which portfolio companies are involved in activities that contribute towards addressing these critical global challenges, as a mapping and reporting exercise.

We evaluate alignment with this framework by identifying the proportion of portfolio companies' activities and related revenues that contribute to the achievement of the SDGs. We map 75 categories of business activities linked to 11 of the 17 SDGs and their underlying targets and indicators."

Janus Henderson Investors

Sustainability solutions or transitions strategies

JHI offers four flagship SRI / ESG / sustainable thematic funds:

- **Global Sustainable Equity Fund...** which "focuses on companies that have a positive impact on the environment and society".
- **Sustainable Future Technologies Fund...** which focuses on companies that provide technology solutions with a positive impact on the environment and society.
- **Horizon Global Sustainable Equity Fund...** focusing on companies that contribute to the development of a more sustainable global economy.
- ****US Sustainable Equity Fund...** **companies whose products and services are considered by the Investment Manager as contributing to positive environmental or social change.

Thematic fund focus - Environmental

JHI's US Sustainable Horizons Fund addresses the following environmental themes:

- Efficiency
- Sustainable property & finance
- Cleaner energy
- Water management
- Environmental services
- Sustainable transport

Thematic fund focus - Social

JHI's US Sustainable Horizons Fund addresses the following social themes:

- Safety
- Quality of life
- Knowledge & technology
- Health

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

The Janus Henderson Sustainable Future Technologies Fund uses a thematic framework and will invest in companies that align to the UN's Sustainable Development Goals.

Jupiter Asset Management

Sustainability solutions or transitions strategies

Jupiter's sustainable thematic funds include an environmental solutions strategy - which "invests in 40-60 companies whose core products and services seek to address global sustainability challenges.

Thematic fund focus - Environmental

Jupiter's environmental solutions strategy follows six environmental themes:

- Clean Energy
- Green Mobility
- Green Buildings & Industry
- Sustainable Agriculture & Land Ecosystems
- Sustainable Oceans & Freshwater Systems
- Circular Economy

Thematic fund focus - Social

SRI-C has not identified any specific focus on social issues within the firm's thematic funds or investment strategies.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

The Jupiter Global Leaders Fund seeks to deliver good environmental and social outcomes, including those "real-world outcomes captured by the UN Sustainable Development Goals and the Paris Agreement."

Companies will either:

1. "provide products or services that are, or operate in a way that is, aligned with the delivery of one or more of the United Nations Sustainability Development Goals ("UN SDGs") or
2. align operationally with the temperature goals of the Paris Agreement (a pledge by world leaders in 2015 to limit the global average temperature increase to well below 2 degrees above pre-industrial levels and pursue efforts to limit the temperature increase to 1.5°C above pre-industrial levels²).
3. We also will not invest in a company that is assessed as violating the principles of the United Nations Global Compact ("UNGC")."

Lazard Asset Management

Sustainability solutions or transitions strategies

Lazard manages:

- a Climate Action Fund
- a global sustainable equity fund and
- a global sustainable fixed income fund.

Thematic fund focus - Environmental

The **Lazard Climate Action Fund** seeks to invest in 'climate solution providers whose technologies, products and services directly and tangibly help to mitigate greenhouse gas emissions and/or help society adapt to the effects of climate change'. The fund is targeted at investors 'seeking to capitalize on the opportunities created by the transition to a low-carbon economy'.

Thematic fund focus - Social

The **Lazard Digital Health Fund** is a global equity fund focused on innovative scientific and technological breakthroughs that are disrupting the health ecosystem.

"The team invests in companies from various sectors that they believe are positioned to benefit from key paradigm shifts in health care."

Among these are: digitalization and artificial intelligence, advanced diagnostics and prevention, or targeted therapies and novel drug modalities such as gene editing.

Together, these activities appear poised to 'improve how people experience healthcare, improve their quality of life, reduce cost of care, and ultimately increase human longevity'.

Thematic fund focus - Economic

The **Lazard Global Thematic Focus Fund** is "designed to benefit from structural change and disruption in industries and companies anywhere in the world."

Thematic fund focus - UN SDGs

Lazard has a ****sustainable private infrastructure fund**** where each investment 'must deliver positive social and/or environmental impacts aligned with the UN Sustainable Development Goals (SDGs).'

Legal and General Investment Management

Sustainability solutions or transitions strategies

SRI-C has not identified any thematic, transition or sustainability solutions strategies managed by this firm.

Thematic fund focus - Environmental

While we note that LGIM offers a** Net Zero Global Corporate Bond Fund, **this is focused on the firm's net zero investing framework rather than on investments in transition stocks.

SRI-C has not found any other environmentally-focused funds.

Thematic fund focus - Social

N/A - no thematic funds or investment strategies identified.

Thematic fund focus - Economic

N/A - no thematic funds or investment strategies identified.

Thematic fund focus - UN SDGs

L&G Future World Global Equity Focus Fund ... 'invests in companies which positively contribute to the United Nations Sustainable Development Goals (SDGs)' by investing in 'companies which:

- contribute to environmental or social objectives
- do not significantly harm any environmental or social objectives, and
- follow good governance practices.

Liontrust

Sustainability solutions or transitions strategies

The following funds have been classified as Article 9 products under the SFDR, having sustainable investment as their investment objective:

- Liontrust GF Sustainable Future European Corporate Bond Fund
- Liontrust GF Sustainable Future Pan European Growth Fund
- Liontrust GF Sustainable Future Global Growth Fund
- Liontrust GF Sustainable Future Multi-Asset Fund
- Liontrust GF Sustainable Future US Growth Fund

Thematic fund focus - Environmental

Liontrust has identified three mega trends:

- Better resource efficiency (cleaner)
- Improved health (healthier) and
- Greater safety and resilience (safer)

... and 22 themes within these.

Environmental themes of focus include:

- Improving the efficiency of energy use
- Improving the resource efficiency of industrial and agricultural processes
- Delivering a circular materials economy
- Improving management of water
- Increasing electricity from renewable sources

Thematic fund focus - Social

Social themes of focus include:

- Enabling innovation in healthcare
- Providing education
- Building better cities
- Providing affordable healthcare
- Connecting people
- Enabling healthier lifestyles
- Encouraging sustainable leisure

Thematic fund focus - Economic

Economic themes of focus include:

- Enhancing digital security
- Increasing financial resilience
- Saving for the future
- Better monitoring of supply chains and quality control
- Leading ESG management
- Ensuring a sustainable economy

Thematic fund focus - UN SDGs

Managers are required to 'show how their funds' themes and investments are contributing to the UN's SDGs.'

Sustainable future fund factsheets discuss contribution to the SDGs and there is 'alignment' between Liontrust themes and the SDGs..

Lombard Odier Investment Management

Sustainability solutions or transitions strategies

Lombard Odier offers several Equity Funds in the sustainable thematic category, including:

- **Circular Economy** - invests in "companies that are harnessing the productive and regenerative power of nature via the circular bioeconomy, and from the need to preserve natural capital by transitioning to leaner forms of industry"
- **Planetary Transition** - invests in companies that are accelerating transitions across our Planetary Boundaries.
- **New Food Systems** - invests in "companies meeting demand for changing eating habits, improving agriculture and food production throughout our global food systems"

Thematic fund focus - Environmental

In addition to its climate transition related themes and funds, Lombard Odier's Circular Economy Fund focuses on four environmentally-focused investable revolutions:

- Circular bio-economy
- Resource efficiency
- Outcome-orientated re-economy
- Zero waste

Thematic fund focus - Social

Lombard Odier's New Food Systems Strategy focuses on themes which have a social orientation:

- Sustainable food production
- Enabling solutions
- Sustainable food consumption

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

M&G Investments [M&G]

| Sustainability solutions or transitions strategies | |
|--|--|
| <p>M&G's sustainable investment solutions include one for 'Positive Impact Equities' which aims to "make long-term investments in companies from around the world that aim to generate a positive social and/or environmental impact alongside a financial return."</p> <p>In addition to this, the firm manages a:</p> <ul style="list-style-type: none"> • Nature and Biodiversity Solutions Fund and a • Sustainable Solutions Bond Fund. | |
| Thematic fund focus - Environmental | Thematic fund focus - Social |
| <p>Focus areas include climate and biodiversity.</p> | <p>Focus social issues for M&G's sustainability funds include: culture, diversity & inclusion, modern slavery.</p> |
| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
| <p>SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.</p> | <p>The themes applied in M&G's Positive Impact Equities strategy are mapped to the UN SDG framework.</p> <p>For impact holdings in listed markets, M&G undertakes its own 'III' (Investment, Intention, Impact) Impact Research – providing a detailed analysis of the intentionality, measurability and additionality of the impacts of companies. This analysis includes an evaluation of the company's (or a bond's) contribution to Sustainable Development Goal (SDG) targets (% revenues) and sets out the KPIs to be used for the measurement and management of the impact generated.</p> |

MFS Investment Management

Sustainability solutions or transitions strategies

SRI-C has not identified any thematic, transition or sustainability solutions strategies managed by this firm.

Thematic fund focus - Environmental

N/A - no thematic funds or investment strategies identified.

Thematic fund focus - Social

N/A - no thematic funds or investment strategies identified.

Thematic fund focus - Economic

N/A - no thematic funds or investment strategies identified.

Thematic fund focus - UN SDGs

SRI-C has not been able to identify any specific focus on the UN SDGs within the firm's sustainability thematic funds.

Mondrian Investment Partners

Sustainability solutions or transitions strategies

SRI-C has not identified any sustainable thematic solutions or transition funds offered by Mondrian.

| Thematic fund focus - Environmental | Thematic fund focus - Social |
|-------------------------------------|------------------------------|
|-------------------------------------|------------------------------|

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|-----|-----|
| N/A | N/A |
|-----|-----|

| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
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| N/A | N/A |
|-----|-----|

Nordea Asset Management

Sustainability solutions or transitions strategies

Nordea manages a range of thematic investment funds including:

- Global Climate and Environment Fund
- Global Social Empowerment Fund
- Global Diversity Engagement Fund

Thematic fund focus - Environmental

The Global Climate and Environment Fund invests in companies, which are expected to benefit either directly or indirectly from developments related to environmental challenges such as climate change.

Thematic fund focus - Social

The Global Social Empowerment Fund invests in businesses providing positive social solutions on "vital needs, inclusion and empowerment"

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

The firm's Responsible Investment Policy aims to "encourage the companies we invest in to support the United Nations Sustainable Development Goals ("SDGs") and comply with international conventions and norms."

Norges Bank Investment Management

Sustainability solutions or transitions strategies

NBIM does not run segregated sustainability thematic or transition funds.

Thematic fund focus - Environmental

N/A - NBIM does not run segregated sustainability thematic equity funds.

However, "the fund's management mandate was amended in 2020 to include infrastructure for renewable energy. Up to 2 percent of the fund can be invested in unlisted renewable energy infrastructure. These investments represented 0.1 percent of the fund at the end of 2023.

(Source: [NBIM Responsible Investment Report GPGF 2023](#))

Thematic fund focus - Social

N/A - NBIM does not run segregated sustainability thematic equity funds

Thematic fund focus - Economic

N/A - NBIM does not run segregated sustainability thematic equity funds

Thematic fund focus - UN SDGs

NBIM does not run segregated sustainability thematic equity funds.

Pictet Asset Management

Sustainability solutions or transitions strategies

Pictet features a number of funds on its website that it considers to be of most interest to responsible investors, these include:

- Clean energy transition
- Global environmental opportunities
- Global thematic opportunities
- Positive change
- Quest global sustainable
- Quest AI-driven global

The firm manages 11 'Article 9' funds with EUR24 bn in AUMs.

Thematic fund focus - Environmental

Focus areas include: low carbon transition, sustainable forests, water conservation, water quality, biodiversity.

Thematic fund focus - Social

Pictet AM funds focus on companies that focus on societal issues under the categories of:

- Human
- Health and nutrition

Thematic fund focus - Economic

"We believe in a holistic view that considers the complex interactions between economy, society and the environment."

Pictet has developed a Megatrends Framework which includes issues such as AI, urbanisation, and economic growth.

Thematic fund focus - UN SDGs

For the Positive Change fund "the investment team employs a bottom-up, active approach, based on deep fundamental analysis and has developed a proprietary Natural Language Processing (NLP) tool to help assess the alignment of a company's products and services to the SDGs.

[On top of this] ... we actively engage with selected companies to accelerate their alignment with the UN SDGs, where we believe this transition will lead to rising demand for their products and services."

Pzena Investment Management

Sustainability solutions or transitions strategies

N/A - Pzena does not manage sustainability thematic strategies

Thematic fund focus - Environmental

N/A - Pzena does not manage sustainability thematic strategies

Thematic fund focus - Social

N/A - Pzena does not manage sustainability thematic strategies

Thematic fund focus - Economic

N/A - Pzena does not manage sustainability thematic strategies

Thematic fund focus - UN SDGs

N/A - Pzena does not manage sustainability thematic strategies

Redwheel

Sustainability solutions or transitions strategies

Redwheel's Sustainable Growth team manages multiple sustainable thematic strategies:

- Clean economy
- Biodiversity
- Life changing treatments

Alongside this team, the Ecofin team "manages a range of global equity thematic strategies with the aim of delivering strong risk-adjusted returns to clients while tackling some of the planet's biggest environmental challenges, such as decarbonising energy supply and infrastructure."

Thematic fund focus - Environmental

Two of Redwheel's thematic strategies are environmentally focused:

- Clean economy ... key investment themes of this fund include, Low Carbon Transport, Smart Energy, Adaptation and Natural Resource Reservation
- Biodiversity ... key investment themes of this fund include, Sustainable Materials, Terrestrial Ecosystems, Aquatic Ecosystems and Circularity & Waste Management

In addition, the Ecofin team "manages a range of global equity thematic strategies [focused on] decarbonising energy supply and infrastructure."

Thematic fund focus - Social

Redwheel's investment strategy** **Life Changing Treatments** **is socially-focused with investment areas including:

- Life changing drugs
- Health system strengthening
- Life changing care

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.

Thematic fund focus - UN SDGs

SRI-C has not identified any specific focus on the UN SDGs in relationship to thematic funds managed.

Robeco

Sustainability solutions or transitions strategies

Robeco offer a range of sustainable investing strategies comprising:

- Climate Investing funds
- SDG-focused funds
- Thematic funds

The following sustainability-focused sub-strategies exist within the thematic range:

- Fashion Engagement
- Smart Energy
- Smart Materials
- Smart Mobility
- Sustainable Water
- Sustainable Healthy Living
- Circular Economy
- Biodiversity

Thematic fund focus - Environmental

Robeco's sustainable thematic funds include a number of environmentally-focused funds including:

- **Biodiversity Equities** ... invests in stocks of companies in countries globally which support the sustainable use of natural resources and ecosystem services to help reduce Biodiversity loss.
- **Circular Economy** ... invests globally in companies aligned with circular economy principles
- **Smart Energy** ... invests globally in companies providing technologies for clean energy production, distribution, power management infrastructure and energy efficiency.
- **Smart Mobility** ... invests globally in companies involved in the transformation and decarbonization of the global transportation sector
- **Sustainable Water** ... invests globally in companies offering products and services across the water value chain

Thematic fund focus - Social

Robeco's sustainable thematic funds include a number of socially-focused funds including:

- **Global Gender Equality** ... invests globally in companies that advance gender diversity and gender equality
- **Sustainable Healthy Living** ... invests globally in companies that promote good health and well-being and contribute to an efficient healthcare system

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.

Thematic fund focus - UN SDGs

Robeco's sustainable thematic funds include one SDG focused fund: the Global SDG & Climate Conservative Equities which invests in stocks of companies in developed and emerging countries across the world that advance the United Nations Sustainable Development Goals (SDGs) and pursue a carbon reduction objective.

Additionally, this strategy excludes controversial stocks from the investable universe, as well as those that contribute negatively to the Sustainable Development Goals (SDGs) based on the Robeco proprietary SDG framework.

Royal London Asset Management

Sustainability solutions or transitions strategies

RLAM's sustainable fund range comprises six funds, including:

- Global Equity Transitions
- Global Sustainable Equity
- Sustainable Leaders Trust

Thematic fund focus - Environmental

Environmental focus areas for RLAM include climate change and biodiversity.

Thematic fund focus - Social

Priority social issues for RLAM include social and financial inclusion, health. Also 'innovation, technology and society' is another theme highlighted.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.

Thematic fund focus - UN SDGs

SRI-C has not identified any specific focus on the UN SDGs in relationship to thematic funds managed.

Schroders Asset Management

Sustainability solutions or transitions strategies

Schroders manage multiple sustainability-focused funds.

8 of these are sustainable thematic funds which Schroders describe as meeting structural challenges such as climate change. They include:

- Global Energy Transition Fund
- Global Sustainable Food and Water Fund
- Global Climate Change
- Global Climate Leaders
- International Carbon Neutral Credit

Thematic fund focus - Environmental

Climate change – Climate risk and oversight – Decarbonising and minimising emissions – Just Transition – Climate adaptation – Climate solutions **Natural capital and biodiversity** – Nature-related risk and management – Circular economy, pollution and waste – Sustainable food and water – Deforestation

Thematic fund focus - Social

The Schroders Sustainable Food and Water fund focuses on the social issues of water and food provision.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

UN SDGs are considered within the firm's sustainability thematic toolkit, Themex.

"Where possible we align our desired long-term outcomes with established international goals, such as the Paris Agreement or the United Nations Sustainable Development Goals (UN SDGs)."

State Street Global Advisors

Sustainability solutions or transitions strategies

SRI-C has not been able to identify any sustainability thematic funds managed by State Street.

| | |
|--|-------------------------------------|
| Thematic fund focus - Environmental | Thematic fund focus - Social |
|--|-------------------------------------|

N/A

N/A

| | |
|---------------------------------------|--------------------------------------|
| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
|---------------------------------------|--------------------------------------|

N/A

SRI-C has not identified any specific focus on the UN SDGs in relationship to thematic funds.

Swedbank Robur

Sustainability solutions or transitions strategies

Swedbank Robur's sustainable thematic funds include:

Transition Global ... "invests globally mainly in companies in various industries that, through their products, services or operations, according to Swedbank Robur's assessment, contribute to the transition to a more sustainable society"

Transition Energy ... "invests in companies that, through their products, services or operations, according to Swedbank Robur's assessment, contribute to the transition to a more sustainable society"

Healthcare ... "invests primarily globally in large and medium-sized companies in various sectors of the healthcare industry, such as pharmaceuticals, biotechnology, medical technology and healthcare-related services"

Thematic fund focus - Environmental

Swedbank Robur's Transition Global and Transition Energy funds are both environmentally-focused and target:

- Climate
- Natural Resources
- Energy

Thematic fund focus - Social

Swedbank Robur's Transition Global and Healthcare funds are both socially-focused and address the following themes:

- Healthcare
- Health and well-being
- Demography and diversity
- Innovation and security

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

SRI-C has not been able to identify any specific focus on the UN SDGs within the firm's sustainability thematic funds or strategies.

Thornburg Investment Management

Sustainability solutions or transitions strategies

SRI-C has not identified any thematic, transition or sustainability solutions strategies managed by this firm.

| Thematic fund focus - Environmental | Thematic fund focus - Social |
|-------------------------------------|------------------------------|
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| N/A | N/A |
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| Thematic fund focus - Economic | Thematic fund focus - UN SDGs |
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| N/A | N/A |
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UBS Asset Management

Sustainability solutions or transitions strategies

UBS' [pure-play thematic equities](#) targets exposure to "megatrends shaping the future". Chosen themes include: security, robotics, digital health, infrastructure, energy evolution, environmental impact and edutainment.

UBS thematic funds focus on areas such as:

- the energy transition,
- water,
- human development,
- food,
- the global environment
- and climate change.

Thematic fund focus - Environmental

UBS offers the Life Climate Aware World Fund and the [UBS Life All World Equity Fundamentally Weighted Low Carbon Transition GBP Hedged Index Fund](#)

Thematic fund focus - Social

SRI-C has not identified any specific focus on social issues in relationship to thematic funds managed.

Thematic fund focus - Economic

Economic themes of focus range across robotics and automation, cybersecurity, digital transformation, big data and computing power, to artificial intelligence, and cloud solutions.

A number of [pure play](#) funds are offered in these areas.

Thematic fund focus - UN SDGs

The UN Sustainable Development Goals (SDGs) create the framework for the firm's impact investing.

UBS has introduced an ESG Opportunity Dashboard to its proprietary suite of ESG Integration tools. The Dashboard enables UBS to view companies' sustainable revenues and alignment to the Sustainable Development Goals (SDGs). This sits alongside the ESG Risk Dashboard.

Vanguard Group (Investor)

Sustainability solutions or transitions strategies

Vanguard Group offers some 'solutions' funds in its own name and provides access to funds managed by others (such as the Vanguard Baillie Gifford Global Positive Impact Stock Fund).

Thematic fund focus - Environmental

The **Vanguard Global Environmental Opportunities Stock Fund** seeks to invest in companies which derive 'at least 50% of their revenue from activities deemed by the fund's advisor to contribute positively to environmental change and that are involved in the process of decarbonization'.

Thematic fund focus - Social

Vanguard offers the **Vanguard FTSE Social Index Admiral Shares Fund**.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues within the firm's thematic funds or investment strategies.

Thematic fund focus - UN SDGs

SRI-C has not been able to identify any specific focus on the UN SDGs within the firm's thematic investment approach.

Wellington Management

Sustainability solutions or transitions strategies

Thematic funds managed by Wellington include:

- Climate Strategy Fund ... companies that focus on most directly addressing environmental sustainability or climate risks through their products, service or capital.
- Global Impact Fund ... focuses on companies that seek to improve access to, and the quality of, basic life essentials, reduce inequality and mitigate the effects of climate change.
- Sustainable Outcomes Fund ... focuses on companies within three themes: life essentials, human empowerment & environment. Within these themes, the Investment Manager seeks companies that are either enabling or activating their ecosystem to drive a positive social or environmental outcome.
- Global Climate and Environment Fund ... invests in companies that have a material and measurable exposure to climate-related activities whose products, services, capital or strategy meet at least one of their five climate stewardship criteria.

Thematic fund focus - Environmental

One of the focal themes of the Sustainable Outcome Funds is 'environmental':

- the environment (such as alternative energy, resource efficiency, resource stewardship)

Thematic fund focus - Social

Two of the focal themes of the Sustainable Outcome Funds are 'social':

- life essentials (such as affordable housing, clean water and sanitation, health, sustainable agriculture and nutrition)
- human empowerment (such as digital divide, education and jobs training, financial inclusion, safety and security)

Thematic fund focus - Economic

Thematic fund focus - UN SDGs

WHEB Asset Management

Sustainability solutions or transitions strategies

WHEB's investment strategy is available in a range of funds designed to meet different investors' needs:

- FP WHEB Sustainability Impact Fund is WHEB's original fund - With approximately 45 holdings, the fund invests across WHEB's nine environmental and social investment themes. The fund exclusively invests in companies providing solutions to sustainability challenges - businesses whose products and services have a positive impact on the world.
- The WHEB Environmental Impact Fund is a targeted version of the global strategy used in our other two funds. It only invests in our five environmental themes and has approximately 25 holdings. The fund invests exclusively in companies providing solutions to environmental sustainability challenges - businesses whose products and services have a positive impact on the environment.
- The WHEB Sustainable Impact Fund follows the same investment strategy as the older UK OEIC.

Thematic fund focus - Environmental

Wheb's funds focus on five environmental themes: cleaner energy, environmental services, resource efficiency, sustainable transport, and water management.

Thematic fund focus - Social

Wheb's funds focus on four social themes:

- Education
- Health
- Safety, and
- Well-being.

Thematic fund focus - Economic

SRI-C has not identified any specific focus on economic issues in relationship to thematic funds managed.

Thematic fund focus - UN SDGs

WHEB's strategy addresses 7 of the UN SDGs directly and the remaining 10 indirectly.

Zevin Asset Management LLC**Sustainability solutions or transitions strategies**

SRI-C has not been able to identify any sustainable thematic strategies managed by Zevin.

Thematic fund focus - Environmental

SRI-C has not been able to identify any sustainable thematic strategies managed by Zevin.

Thematic fund focus - Social

SRI-C has not been able to identify any sustainable thematic strategies managed by Zevin.

Thematic fund focus - Economic

SRI-C has not been able to identify any sustainable thematic strategies managed by Zevin.

Thematic fund focus - UN SDGs

SRI-C has not been able to identify any sustainable thematic strategies managed by Zevin.

