

# PACIFIC SUSTAINABLE MPS PORTFOLIO RANGE

Sustainable Growth Range

Truly Sustainable

Highly Diversified

Risk Targeted

Proven Investment Expertise

## INTRODUCTION

The Pacific Sustainable MPS Portfolio Range consists of three risk targeted multi-asset portfolios designed for those investors who seek to grow the value of their capital but wish to ensure that strict environmental, social, governance (ESG) principles are applied to the underlying choice of the investments.



## SUSTAINABLE MPS PORTFOLIO RANGE

Designed to accommodate a range of client risk appetites and returns expectations.

CONSERVATIVE	BALANCED	ADVENTUROUS
Aims to achieve capital growth using sustainable investments, with a focus on capital preservation, combining lower risk investments and equity market exposure.	Aims to achieve capital growth using sustainable investments, balancing capital preservation and equity market exposure.	Aims to achieve capital growth using sustainable investments, with a bias towards equity market exposure.
<p> <span style="color: purple;">●</span> Global Equity             <span style="color: magenta;">●</span> UK Equity             <span style="color: pink;">●</span> Emerging Equity             <span style="color: red;">●</span> Thematic Equity             <span style="color: orange;">●</span> Investment Grade Corporate Bonds             <span style="color: lightorange;">●</span> Strategic Fixed Income             <span style="color: yellow;">●</span> Absolute Return             <span style="color: green;">●</span> Cash         </p>		

**Holdings and allocations are subject to change.**

Limited exposure to  
the equity market

Full exposure to the  
equity market

## CLIENT BENEFITS



Sustainable solutions designed to accommodate a range of client risk appetites and returns expectations



Helping clients meet their investment goals whilst abiding by strict environmental, social, governance (ESG) principles



Outstanding track record of sustainable multi-asset investing with highly experienced investment team



Established and disciplined investment process focusing on the sustainability credentials of all the underlying investments



Source: Pacific Asset Management. Strategy holdings and allocations are subject to change. Totals may not sum to 100% due to rounding.

## IDENTIFYING THE BEST SUSTAINABLE INVESTMENTS

Alongside the team's rigorous process to select the best-in-class investment managers, they use two globally recognised frameworks to assess the sustainability credentials of the underlying investments.

### GLOBAL SUSTAINABLE INVESTMENT ALLIANCE

The GSIA is globally recognised framework which classifies the universe of sustainable products against a range of sustainable targets. This allows the team to define the nature of our sustainable implementation in the following formats and calculate the percentage of the portfolio covered by a sustainable target.



### SUSTAINABLE THEMES



#### NEGATIVE SCREENING

The exclusion of sectors, companies or practices based on specific criteria.



#### POSITIVE SCREENING

Investments selected for positive ESG performance relative to peers.



#### STEWARDSHIP & VOTING

Investment in themes related to sustainability issues.



#### SUSTAINABLE THEMES

Use of shareholder power to influence corporate behaviour.



#### IMPACT INVESTING

Investment with the intention to generate social and environmental impact.



#### ESG INTEGRATION

The explicit inclusion of ESG factors into financial analysis.



#### NORMS-BASED SCREENING

Screening of investments against minimum standards of business practice.

### UN SUSTAINABLE DEVELOPMENT GOALS

The UN Sustainable Development Goals are a collection of 17 interlinked goals designed to be a blueprint to achieve a better and more sustainable future for all. We map our portfolios to real world change which is vital to the future for a peaceful, more equitable world.



## OUTSTANDING RECORD OF SUSTAINABLE INVESTING

The portfolios are managed by the highly experienced PAM Multi-Asset solutions team who have an outstanding track record of sustainable multi-asset investing, dating back to 2012.

The team has 50+ years combined industry experience across sustainable multi-asset, equities, fixed income, absolute return and alternative risk premia strategies.

**50+** YEARS COMBINED  
INDUSTRY EXPERIENCE

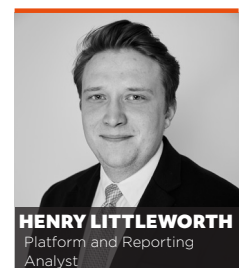
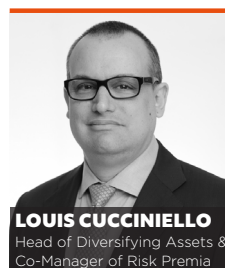
## TRULY MULTI-ASSET, GENUINELY SUSTAINABLE

Within the Sustainable portfolios, the team aim to achieve two goals:

- 1** Create diversified, truly multi-asset products that can deliver returns for clients
- 2** Implement everything within the portfolios in a truly sustainable manner

We believe that these two goals are not mutually exclusive and we can build portfolios with long-term return potential that provide true diversification but still meet stringent sustainable criteria.

## HIGHLY EXPERIENCED INVESTMENT TEAM



Sustainability is a fast moving landscape with a multitude of options available to investors. At PAM we want to reflect the best of these ideas whilst ensuring portfolios remain suitable to their risk objectives. The entrepreneurial nature of Pacific Asset Management and the huge support available to the investment managers allows us to deliver truly multi-asset sustainable products.

- Will Thompson, Chief Sustainability Officer

## INVESTMENT PHILOSOPHY

How do we create a genuinely sustainable portfolio?

### **1** ACTIVE OPTIMISATION & CONSTRUCTION

- ✓ Align portfolios to long-term objectives ensuring that sustainability does not trump suitability.
- ✓ Ensure portfolios are highly diversified and able to react to short-term market volatility.

### **2** SELECTION & EXCLUSION

- ✓ Select Funds based on Sustainable characteristics using global recognised sustainable frameworks.
- ✓ Firms must be UNI PRI Signatories and exclude controversial activities ie Weapons, Tobacco, Alcohol, Gambling, Nuclear Power etc.

### **3** MONITORING & RISK MANAGEMENT

- ✓ Ongoing analysis of underlying holdings to ensure alignment UN Sustainable Development goals and stringent sustainable criteria.
- ✓ Risk management discipline enforced at every level of decision-making.

## UNDERSTANDING THE CARBON IMPACTS OF INVESTING SUSTAINABLY

### PACIFIC SUSTAINABLE MPS PORTFOLIO RANGE CARBON METRICS ANALYSIS

**£500K INVESTED EQUATES TO:**



Carbon usage measured in tonnes of carbon per \$m of sales

When utilising this measure, we cover 77.4% of the portfolio (government bonds, alternatives and cash are not able to be calculated)

'Comparison made versus an equivalent portfolio from an asset allocation perspective populated with benchmark holdings'

*For illustrative purposes only*



### WHAT DOES SUSTAINABLE INVESTING MEAN TO PAM?

Sustainable investing is a catch-all term for investing in a way that accounts for being socially responsible and investing ethically while also seeking returns.

**At PAM** we use the term sustainable investing to capture the various methods of incorporating concerns around Environmental, Social and Governance (ESG) issues into our investment decision making processes.

#### A commitment to responsible investing

As a signatory to the UN PRI Principles for Responsible Investment, Pacific Asset Management has publicly stated our support for the better understanding of the investment implications of ESG factors.

As a business we are committed to constantly strive to be a more responsible firm both in how we operate and how we manage our clients' investments.




## PLEASE GET IN TOUCH

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