

Media Release

COLUMBIA THREADNEEDLE'S RESPONSIBLE GLOBAL EQUITY STRATEGY CELEBRATES ITS 25 YEAR ANNIVERSARY

- **CT Responsible Global Equity strategy, launched in 1998, was designed to achieve long term growth whilst incorporating financially material ESG factors**

LONDON, 09 MAY 2023: The Columbia Threadneedle Responsible Global Equity strategy (CT Responsible Global Equity), designed to achieve long term capital growth whilst safeguarding clients' ethical and sustainable interests, celebrates its 25th anniversary this month. The strategy is part of Columbia Threadneedle Investments' wider ESG global equity range, which comprises five responsible, sustainable and impact strategies. CT Responsible Global Equity is underpinned by an investment philosophy dating back to 1984, when the business launched Europe's first ethically screened fund.

The Responsible Global Equity strategy was established in 1998 on the basis that incorporating financially material ESG factors, across research and decision-making, helps deliver stronger, long-term risk-adjusted returns, evidenced by the strategy's longevity and performance:

	Annualised return total over 25 years	Total return over 25 years ¹	Percentile in IA Global Universe Sector
CT Responsible Global Equity Strategy ²	6.20% ³	350.62%	44

Past performance does not predict future returns. All fund performance data is net of fees.

The strategy's research driven screening process, combining insights from Columbia Threadneedle's research capability as well as its 40+ responsible investment analysts, looks to uncover companies who provide real world impact, a key measure of the strategy's success.

The strategy's focus is to invest in businesses that provide sustainable solutions to global challenges, whilst providing meaningful positive impact.

¹ GBP 01/04/1998 – 31/03/2023

² Based on a representative account

³ Figures shown net of fees

Jamie Jenkins, Global Head of ESG Equities and Portfolio Manager of the CT Responsible Global Equity Strategy commented:

“We are immensely proud to reach this milestone. Our longevity is a testament to the value in ethically driven, ESG led investing and our performance is evidence that responsible investment complements and encourages long term capital growth.

“The principle of the Responsible Global Equity strategy, to mobilise capital with intent and purpose, has remained paramount through its 25-year history. Despite this constant, the strategy has only enjoyed continued performance success by consistently evolving its economic model and embracing impact as a key input into capital allocation decisions and ultimately, as a key determinant of future investment returns.

“We look forward to the next 25 years in ESG investing. The last decade has seen the portfolio become increasingly orientated around our seven sustainability themes. It’s a shift that’s entirely aligned with broader recognition of sustainability-orientated challenges and the emergence of a raft of related investment opportunities in well placed pioneering businesses. Amongst the core emerging themes are concepts such as Net Zero cities, innovations such as artificial intelligence and developments and resource efficiency such as the circular economy.

“Whilst such evolution in responsible investment may have been unfathomable 25 years ago when the strategy was born, the core tenets of the strategy such as our ‘avoid, invest, improve’ investment philosophy remains constant.”

The value of investments and any income from them can go down as well as up and investors may not get back the original amount invested.

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Notes to Editors

About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset manager, entrusted with £491bn⁴ on behalf of individual, institutional and corporate clients around the world.

We have more than 2500 people including over 650 investment professionals based in North America, Europe and Asia⁵. We offer our clients a wide range of strategies across equities, fixed income and alternatives, as well as specialist responsible investment capabilities and a comprehensive suite of solutions.

Columbia Threadneedle Investments is the global asset management group of Ameriprise Financial, Inc. (NYSE:AMP), a leading US-based financial services provider. As part of Ameriprise, we are supported by a large and well-capitalised diversified financial services firm.

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⁴ Source: Ameriprise Financial Q1 2023 earnings release

⁵ As at 31 March 2023, Columbia Threadneedle Investments