

CT Net Zero Transition Euro Buy and Maintain Fund

A buy and maintain credit fund with a formal commitment to net zero.

The fund invests in physical corporate bonds to provide investors with growth and income. The fund implements explicit ESG objectives, with assets being managed under a Net Zero Framework.





Constant target duration of c.7 years





transaction costs



Article 8 under SFDR**

Our approach



Fundamental stability of revenues and cashflows

Our approach to investment grade credit is based on high-quality, bottom-up, issuer research. For buy and maintain, this is tilted towards stability of revenues and cashflows which enable the companies to withstand shocks.



Team-based approach

A team of over 20 dedicated portfolio managers and analysts, debating issuers, industries and market outlook, results in the best investment decisions for our clients.



Downside Risk Management

We understand that in this asset class we risk our clients' capital to earn stable cash flows. Downside risk management is the main starting point to managing credit portfolios successfully.

Meet the team

- 10 Investment Grade Portfolio Managers globally
- 16 Credit Analysts
- 40+ Responsible Investment experts (6 specialists on environmental themes)



Andrew Brown Buy & Maintain Credit Portfolio Manager



Rebecca Seabrook Buy & Maintain Credit Portfolio Manager



Richard Ferris Investment Solutions Specialist

Our experience



Experience of managing buy and maintain credit



Managed globally in buy and maintain credit



AUM in strategies explicitly linked to ESG criteria

ESG objectives

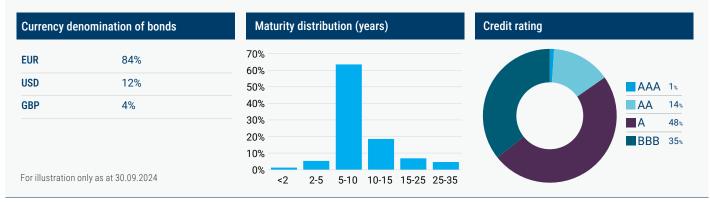
Implementation of ESG objectives aligned to Article 8 under SFDR**

- Carbon emissions reduction aligned to a global Net Zero pathway
 - 'Top-down' portfolio emissions reduction in line with a global net zero pathway
 - 'Bottom-up' assessment of asset alignment and target for 70% of portfolio emissions to be aligned or aligning
- Elevated standards of sustainability
 - Limit investment in Weapons, Tobacco, Fossil Fuels and Electricity Generation
- Enhanced standards of good governance
 - Formal review policy for lowest ESG scores and companies with severe breaches of UN Global Compact Principles

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Base currency	EUR
Launch date	October 2024
Management style	Constant maturity buy and maintain
Interest rate duration	c. 7 years
ESG style	ESG Elevated***
Number of issuers	100-150
Credit rating	BBB- or above at purchase
Credit rating Issuer exposure	BBB- or above at purchase AAA: 5%; AA: 3%; A: 2%: BBB: 1.5%; Sub-IG: 1.5%
	AAA: 5%; AA: 3%; A: 2%: BBB: 1.5%;
lssuer exposure	AAA: 5%; AA: 3%; A: 2%: BBB: 1.5%; Sub-IG: 1.5%
lssuer exposure	AAA: 5%; AA: 3%; A: 2%: BBB: 1.5%; Sub-IG: 1.5% At least 50% EUR bonds.

Illustrative positioning



* Source: Columbia Threadneedle Investments as of 31 December 2023

** Article 8 of the Sustainable Finance Disclosure Regulation (SFDR) requires that financial products promote environmental or social characteristics

*** Source: PRI definition: uses ESG factors to assess the sustainability of companies and countries

To find out more visit columbiathreadneedle.com



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