

COLUMBIA THREADNEEDLE SUSTAINABLE OUTCOMES GLOBAL EQUITY STRATEGY

OBJECTIVE

A concentrated global equity strategy that invests in high-quality companies targeting positive sustainable outcomes and strong financial returns.

SOURCES OF ADDED VALUE

- 1. Twin rewards:** The strategy aims to provide positive sustainable outcomes and strong financial returns – these two objectives are perfectly in harmony and enable clients to invest in a better future.
- 2. Strong credentials:** We are a pioneer in responsible investment with capabilities dating back over 20 years. We were a UN PRI founding signatory and have consistently rated A+ for equities ever since.¹
- 3. Integrated approach:** Our team of responsible investment analysts are fully integrated with fundamental research specialists, and our approach dovetails with the UN Sustainable Development Goals.



PAULINE GRANGE
Portfolio Manager

KEY FACTS

Reference index

MSCI ACWI Index

Typical number of stocks

40 to 60

“In a world of societal and environmental change, companies that invest and innovate for a more sustainable future not only support the planet and its inhabitants but also their own ability to generate strong financial returns.”

– Pauline Grange

¹Source: PRI, as at May 2021. Threadneedle Asset Management Limited was a founding signatory to the Principles for Responsible Investment in 2006.

INVESTMENT APPROACH

There is a significant opportunity to invest in high quality companies that can deliver solutions to the world's sustainability challenges – from renewable energy to affordable housing – while generating capital growth. Our approach draws on the UN Sustainable Development Goals (SDGs), a framework that aims to catalyse the delivery of key sustainable development needs globally. From the SDGs, we have identified a range of investable environmental and social outcomes split across eight themes. We look to identify companies that are currently able or repositioning to deliver on these themes, with the aim of generating strong returns alongside supporting sustainable development.

We want to see that they are investing for a more sustainable future and, in doing so, operating with integrity. Our goal is to build a portfolio of companies that can support sustainable development and generate strong returns.

The investment philosophy and approach builds on our established global equity franchise and the belief that high and emerging quality, growing businesses make for superior investments. Competitive advantage is at the heart of this approach. Our goal is to understand the source of a company's competitive edge and the structure of the industry within which it operates. This gives us the confidence that it can maintain its market position and continue to deliver high returns and stable growth over the long run.

OUR PHILOSOPHY



The world is changing

- Companies that contribute to sustainable outcomes by offering solutions to meet changing demands may enjoy superior growth and returns in the long term.
- Strong and/or improving Environmental, Social and Governance (ESG) credentials are a key indicator of the quality of a company and its management.
- A strong and sustainable competitive advantage enables well-managed companies to consistently deliver high returns on capital.



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