



# SUSTAINABLE INVESTING

Jupiter Global Sustainable Equities Fund

[jupiteram.com](https://www.jupiteram.com)

  
**JUPITER**  
ASSET MANAGEMENT

The Jupiter Global Sustainable Equities Fund targets the best risk-adjusted returns for clients by investing for the long-term in high-quality companies that are leading the transition to a more sustainable world.

Companies actively seeking to minimise their impact on our planet, and to maximise the value they create for society, are more likely to deliver stronger long-term financial returns for investors.

**What a company sells and how a company behaves matters, particularly to its financial returns.**

For example, if a company keeps the interests of its key stakeholders at the core of its decision-making, it is more likely to have a productive work force, strong client retention, and more resilient profitability. If a company proactively manages its impact on the planet by using green energy, using less water, creating less waste, and embedding biodiversity considerations, that is an indication of a long-term approach to its future.

The impact of a company's products and services provides important investment insights. The team looks to address key societal needs, such as gender, race and wealth equality, through analysing how a company behaves and what it sells. Companies that provide preventative healthcare solutions or improve access to financial services align investors to the structural growth drivers arising from the transition to a more sustainable world.

The fund seeks to invest in companies that are financially strong, operationally efficient, and have stable, long-term profitability.

In the following infographics, we explain why this fund is well positioned to help clients align their savings to a more sustainable world.

#### JUPITER GLOBAL SUSTAINABLE EQUITIES FUND

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Financially focused

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Sustainability driven

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Fully integrated ESG

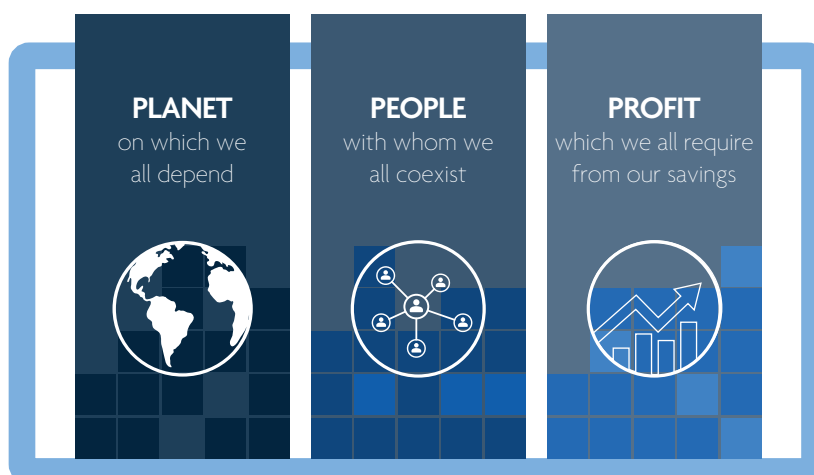
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Stewards of our clients' assets

# 5 reasons to consider changing the way you allocate to global equities.

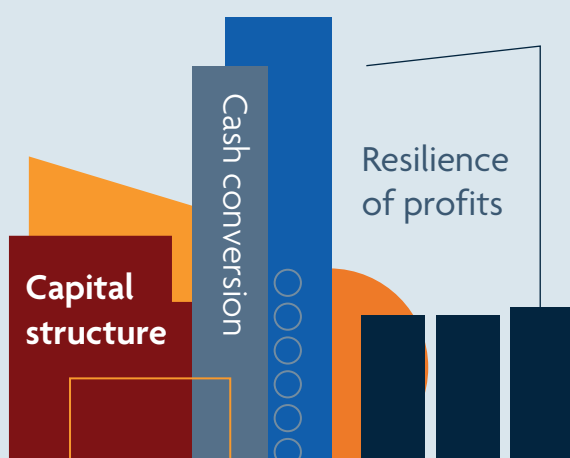
## 01 A FUND FOR PLANET, PEOPLE AND PROFIT

We analyse companies to see how well they balance three key stakeholder needs:



## 02 A FUND WITH ECONOMIC STABILITY AT ITS HEART

We invest in companies that are financially stable, operationally efficient, and have resilient profitability. We believe this is likely to increase investors' long-term returns and reduce volatility.



### FINANCIAL STABILITY

Robust companies with strong balance sheets built to withstand and prosper despite different challenges.

### OPERATIONAL EFFICIENCY

Companies that consistently invest in their business and generate attractive cash flows.

### RESILIENT PROFITS

Companies that have stable, long-term profits.

## 03 A PORTFOLIO WITH A POSITIVE IMPACT

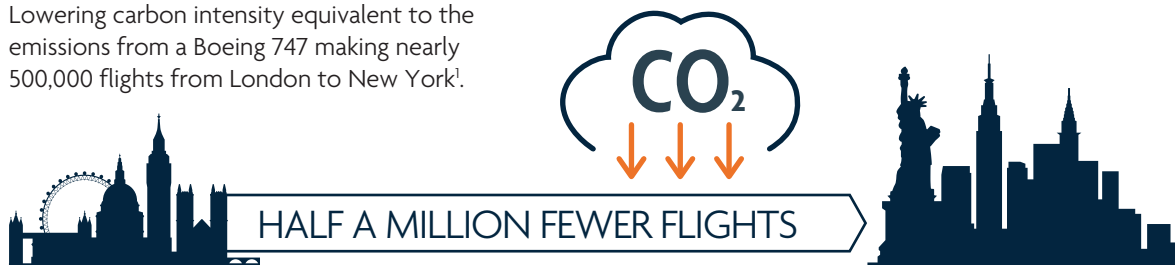
Transparency: the fund's **Annual Impact Report** offers clients transparency into the positive impact their savings are having.



Downloadable for clients at [jupiteram.com](http://jupiteram.com)

### OUR PORTFOLIO HAS: A POSITIVE IMPACT ON THE PLANET

Lowering carbon intensity equivalent to the emissions from a Boeing 747 making nearly 500,000 flights from London to New York<sup>1</sup>.



### A POSITIVE IMPACT ON PEOPLE

>822,000

Jobs created equivalent to half the population of the favelas of Rio de Janeiro, Brazil<sup>2</sup>.

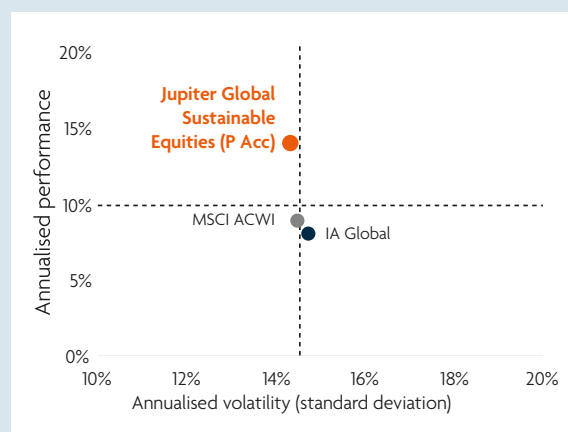


<sup>1,2</sup> Source: *Jupiter Global Sustainable Equities Fund Annual Impact Report 2020*.

### A POSITIVE IMPACT ON PROFIT

The fund has delivered superior returns with lower volatility than its benchmark.

**Past performance is no indication of current or future performance. Fund performance data is calculated on a NAV to NAV or bid to NAV basis dependent on the period of reporting, all performance is net of fees with net income reinvested.** Source: Morningstar in GBP, from 09.04.18 to 31.10.20. Target benchmark: MSCI ACWI in GBP. Comparator: IA Global.



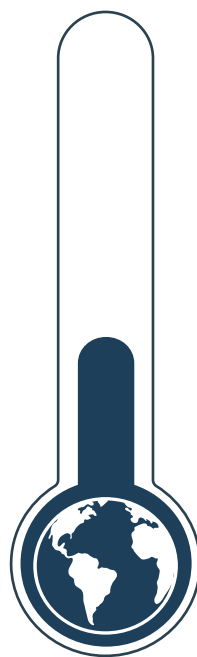


## 04 MEASURED ALIGNMENT WITH KEY SUSTAINABILITY INITIATIVES

### SUSTAINABLE DEVELOPMENT GOALS

The United Nations Sustainable Development Goals (SDGs) highlight key global ambitions in the pursuit of a more sustainable future for everyone.

Our portfolio is aligned either on a direct or indirect basis to the UN SDG framework through either what a company sells or how it operates.



# 1.5°C

NET ZERO BY 2050

Climate action failure and extreme weather are the world's top two risks, according to the World Economic Forum<sup>1</sup>. We evaluate all our investments on how well they help the transition to a low carbon world. **We assess our portfolio to be aligned with the temperature objective of the Paris Agreement on climate change.**

<sup>1</sup> Source: World Economic Forum, The Global Risks Report 2020.  
<https://www.weforum.org/reports/the-global-risks-report-2020>.

### UNITED NATIONS GLOBAL COMPACT

The UN Global Compact sets out fundamental principles of business behaviour related to human rights, labour, the environment and anti-corruption which we expect all of our investee companies to uphold. **We therefore do not invest in companies that violate the UN Global Compact and systematically monitor our portfolio for any violations.**



## 05 INVESTMENT-LED SUSTAINABILITY ANALYSIS

Sustainability and stakeholder assessment are at the heart of all stages of our investment process. We do not rely on third parties or ESG ratings. Instead, our team – which has more than four decades of experience in sustainable investing – deeply analyses companies. This detailed work builds the investment case and drives the fund's risk-adjusted returns.

### CASE STUDIES

This **fintech company** is a leader in managing human capital. Given that it is a service company, offering software to banks and credit unions in the US, its excellence in managing human capital drives customer retention, underpinning its economic sustainability.

97% CUSTOMER RETENTION

#### POSITIVE IMPACT

### CORE FINANCIAL

SOFTWARE INFRASTRUCTURE  
PROVIDES HIGHER LEVELS OF SECURITY



### GENDER DIVERSITY

AT BOARD, MGMT & STAFF LEVEL



9 INDUSTRY, INNOVATION  
AND INFRASTRUCTURE



100%  
revenue

5 GENDER  
EQUALITY



Focus on developing  
its diverse workforce

Vaccination makes a key contribution to global healthcare, preventing thousands of deaths a year.

This **Australian healthcare company**, a provider of vaccines and human blood-based therapies, has state of the art facilities, is number one or two in its end markets, and has outstanding operating efficiency, with a leading approach to gender equality and an important societal role in improving inequality.

30% OPERATING MARGIN

#### POSITIVE IMPACT

C.3.3 MILLION  
vaccines per annum



LIFE-SAVING

plasma therapies to **people** in more than 60 countries



PROVIDES PRODUCTS  
TO TREAT DOZENS OF RARE & SERIOUS DISEASES



3 GOOD HEALTH  
& WELL BEING



100%  
revenue

5 GENDER  
EQUALITY



57%  
female  
employee base

While we are not restricted to investing in any particular theme, our focus on sustainability naturally results in exposure to themes benefitting from key structural growth drivers such as...

PREVENTATIVE  
HEALTHCARE

DIGITISATION  
OF THE ECONOMY

GENDER  
EQUALITY

DECARBONISATION

SOCIAL EQUALITY

FINANCIAL  
INCLUSION

## ● JUPITER GLOBAL SUSTAINABLE EQUITIES FUND

### We seek the best risk-adjusted returns for clients.

We are not an impact only fund.

### ESG and sustainability are core to our philosophy.

We are not a tick box ESG fund.

### Our investible universe includes c.10,000 companies.

We are not a thematically restricted fund.

### Active management to support positive outcomes.

We are not passive or benchmark huggers.

### We seek resilient companies built to survive and prosper over the long-term.

We are not chasers after short-term growth.

Members of the award-winning investment team have **dedicated their careers to active, sustainable investing** and collectively have more than four decades of experience.

### AN EXPERIENCED, DEDICATED TEAM



From left:  
Abbie Llewellyn-Waters, Fund Manager; Mark Evans, Analyst; and Freddie Woolfe, Analyst.

### SUPPORTED BY THE JUPITER DATA SCIENCE TEAM

The six members of the Jupiter Data Science team cleanse and process ESG data to provide the Investment Team with valuable insights.

### SUPPORTED BY JUPITER'S HOUSE-WIDE APPROACH TO STEWARDSHIP



Signatory of:



Principles for Responsible Investment

Jupiter has received the top rating (A+) from the world's leading global responsible investment association.

Note: Awards and ratings should not be taken as a recommendation.

### INDEPENDENT RECOGNITION

#### ESG INVESTMENT AWARDS 2020

Best ESG Equity Fund (Highly Commended)

#### LAPF AWARDS 2019

Impact Manager of the Year

#### FUND MANAGER OF THE YEAR 2017

Women in Investment Awards, Investment Week

#### INVESTMENT WOMAN OF THE YEAR 2017

Women in Investment Awards, Investment Week

# JUPITER'S CORPORATE COMMITMENT TO SUSTAINABILITY

The team's approach is supported by Jupiter's own commitment to sustainability, as demonstrated by a number of key initiatives it signs and endorses.



Jupiter has received the highest rating (tier 1) by the UK's regulator for its approach to stewardship.

Signatory of:



Jupiter has received the top rating (A+) from the world's leading global responsible investment association.



Jupiter is an employer-signatory to Investment20/20, an initiative to promote investment management to diverse talent through school leaver and graduate trainee programmes.



Jupiter is a founder-signatory to the CDP, the global environmental disclosure platform.



Jupiter collaborates with other investors through Climate Action 100+ to ensure the world's largest corporate greenhouse gas emitters take necessary action on climate change.



Jupiter is a member of this collaborative investor network on ESG risks and opportunities relating to intensive animal farming.



Jupiter is a member of the Institutional Investors' Group on Climate Change, the European membership body for investor collaboration on climate change.



Jupiter's annual report meets the recommendations of the Taskforce on Climate Related Financial Disclosures.



Jupiter is a member of Pensions for Purpose, a collaborative initiative of impact managers, pension funds, social enterprises and others involved or interested in impact investment.



Jupiter is a regular participant in the UK Investor Forum, the collective engagement platform for investors to escalate material issues with the boards of UK-listed companies.



Jupiter is a member of the Green Bond Principles, promoting transparency and integrity in the green bond market.



Jupiter is a signatory to the Women in Finance Charter, a pledge towards improving gender balance in the financial services sector.



Jupiter is a signatory to the Workforce Disclosure Initiative, a group pushing for improved disclosure at listed companies.



Jupiter is a signatory to the 30% Club, a global campaign to increase gender diversity at board and senior management levels.



Jupiter is a member of the UK Sustainable Investment and Finance Association, promoting a fair, inclusive and sustainable financial system.



Jupiter is committed to sourcing 100% of the energy in our offices from renewable

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**Important information: This document is for informational purposes only and is not investment advice. Market and exchange rate movements can cause the value of an investment to fall as well as rise, and you may get back less than originally invested.**

The Key Investor Information Document, Supplementary Information Document and Scheme Particulars are available from Jupiter on request.

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