



HAWKSMOOR
FUND MANAGERS

**MODEL PORTFOLIO
SERVICE**



**SUSTAINABLE WORLD
BALANCED MODEL
PORTFOLIO**

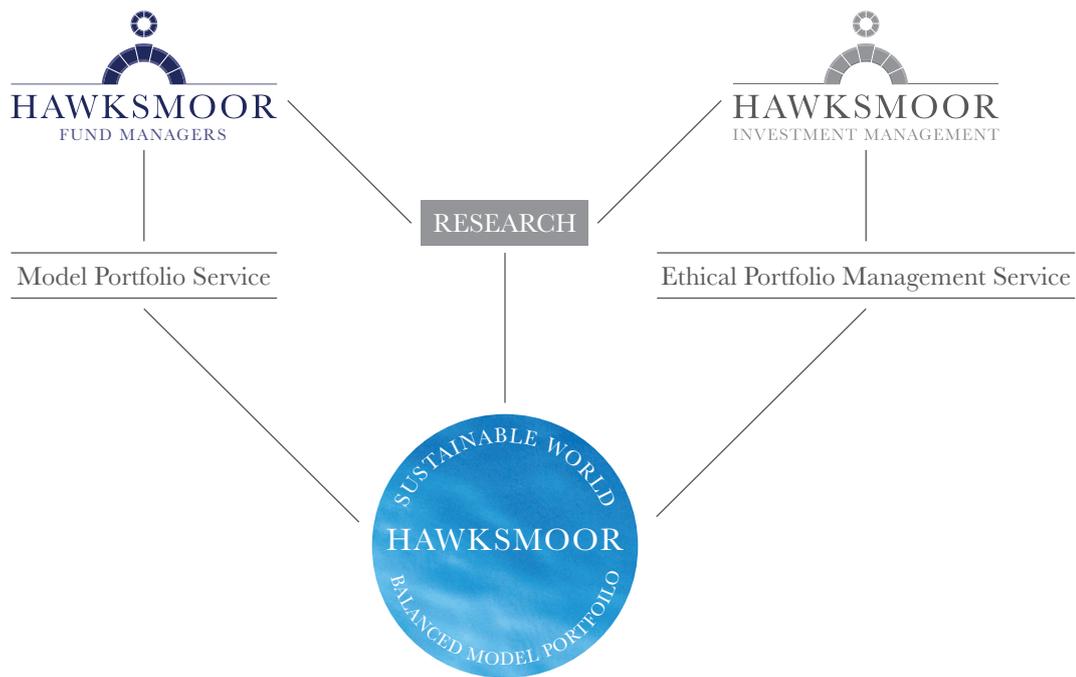
HAWKSMOOR SUSTAINABLE WORLD BALANCED MODEL PORTFOLIO

On both personal and professional agendas, social responsibility and the environment continue to grow in importance. An increased commitment to social justice and environmental issues is also being seen across all age-ranges.

The Hawksmoor Sustainable World Balanced Model Portfolio provides investors with the means to reflect and promote their commitment to these issues through their investment choices, and is an ideal solution for financial advisers who wish to respond to this demand.

The financial sector is no exception. In 2017, more than £1bn of retail money flowed into 'ethical' funds.
(Investment Association, February 2018)

The Hawksmoor Sustainable World Balanced Model Portfolio is an extension of our pioneering Model Portfolio Service (launched in 2009), combined with the expertise gained from our innovative Ethical Portfolio Management Service. It is backed by a rigorous approach to research and investment selection.



WHY INVEST?

① OPPORTUNITY

It offers investors the opportunity to access funds with a responsible, sustainable and positive impact emphasis.

② DIVERSIFICATION

It provides investors with access to a diversified spread of global opportunities.

③ EXPERTISE

It is actively managed by an experienced team running a Defaqto 5* rated Model Portfolio Service and backed by a thorough research process.

INVESTING IN 'ETHICAL' FUNDS DOES NOT MEAN COMPROMISING ON PERFORMANCE

It should be no surprise that companies with a sustainable business model and a positive approach to Environmental Social and Governmental (ESG) factors tend to be better run and constitute a lower-risk than those that do not.

The chart below is produced by breaking the IA UK All Companies sector down into its 'ethical' and 'non-ethical' fund constituents, and shows that over the past 5 years investing in a basket of ethical funds in the UK would have delivered performance in line with a basket of funds without an ethical emphasis.

“Despite the prevailing misconceptions about ‘ethical’ investing, our research shows that you don’t have to sacrifice performance in pursuit of a sustainable world.”

James Clark, Portfolio Manager



31/05/2013 - 31/05/2018 Data from FE 2018

FEATURES

- ① Low entry level amounts (depending on platform).
- ② Designed for investors with a 'moderate' risk profile.
- ③ Aims to generate competitive rates of total return over the long-term - some of which by way of income.

PORTFOLIO MANAGERS

JAMES CLARK



James is a Senior Fund Analyst at Hawksmoor Investment Management. He manages the firm's private client Buy List including a subset of ethical investments. James has 10 years of industry experience.

DAN CARTRIDGE



Dan is a Fund Analyst at Hawksmoor Fund Managers. He supports the management of our Vanbrugh and Distribution funds and our range of Model Portfolios. Dan joined Hawksmoor in 2016 and is an IMC holder.

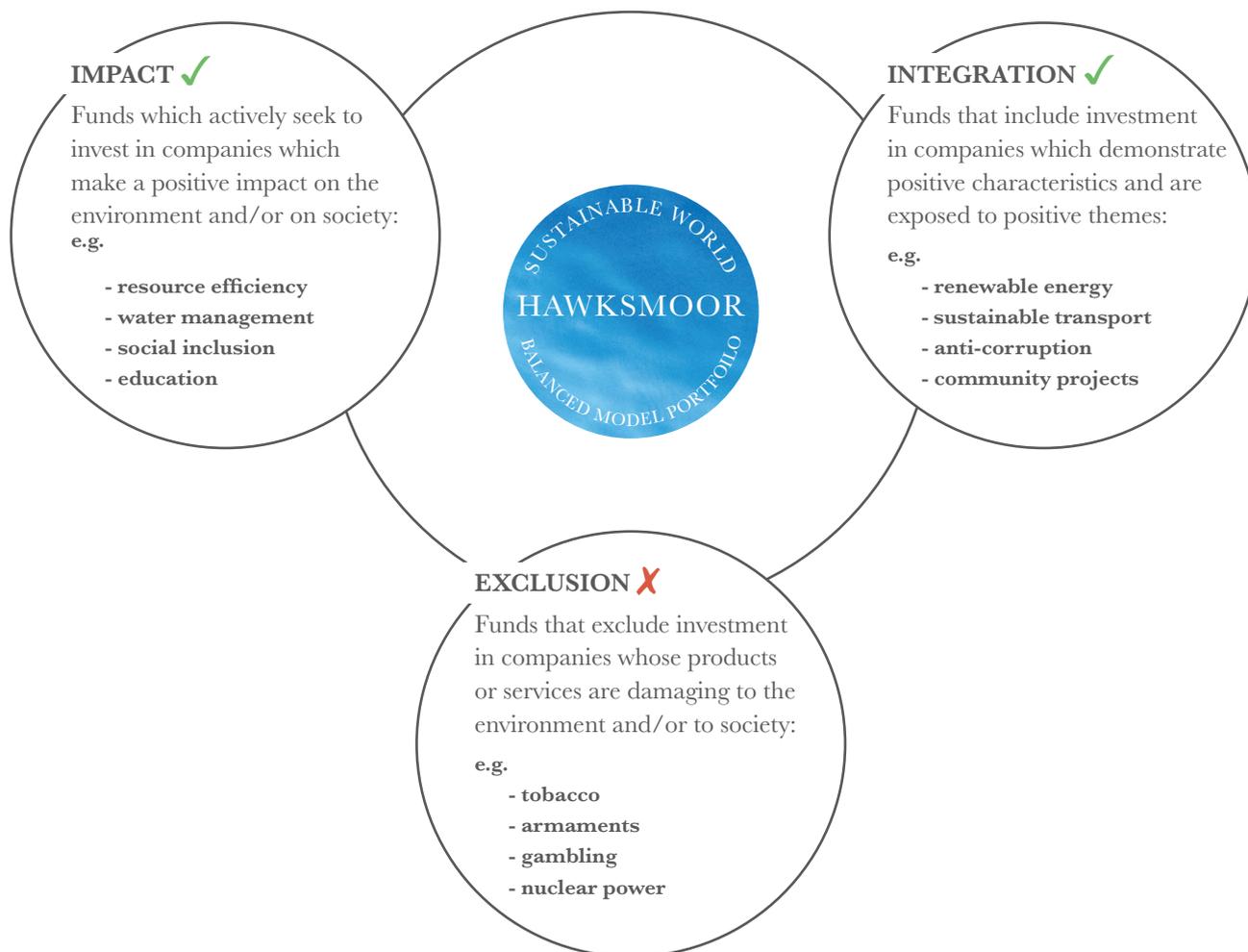
“In 2017, more than £1bn
of retail money flowed
into ‘ethical’ funds.”

Investment Association, February 2018



The Hawksmoor Sustainable World Balanced Model Portfolio is an investment solution for ethically-minded clients of financial advisers, with medium-sized sums available to invest.

With a number of different approaches to ‘ethical,’ ‘responsible’ and ‘sustainable’ investment on offer, we can construct a multi-asset Balanced Model Portfolio that is comprised of:



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Past performance is not a guide to future performance. The value of an investment and any income from it can fall as well as rise. You may not get back the amount you originally invested.

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