

# ESG funds in TAM portfolios win again.

The Investment Week Sustainable & ESG Investment Awards ceremony took to the virtual stage this year in honour of the fund providers, research and ratings teams who have contributed to the significant progress that has been made this year in driving the growth towards ESG investing.

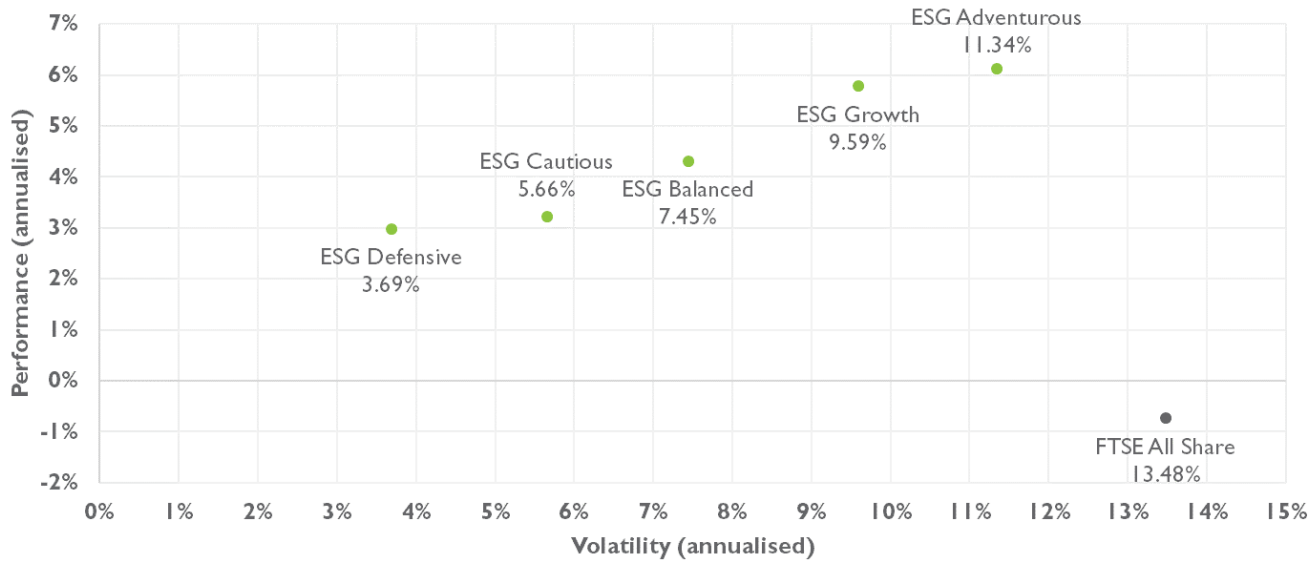
Interest in ethical and sustainable investments has risen dramatically this year, as individuals and institutions have recognised the need to take sustainability risks more seriously in order to protect capital during difficult market conditions, but also to help deliver alpha, by aligning investments to key growth areas which will drive future investment returns, including digitalisation, electrification and clean technologies.

The awards this year included several new categories reflecting the ever-evolving market for ESG investments, including Best Sustainable and ESG Equity, Bond, Multi-Asset and Alternatives categories. There was also a new category for Best Environmental/Climate Change fund and a new award for Best Group for ESG Integration. Finally, in order to highlight groups that are contributing to this evolution process, there were new entries for Best Newcomer, Best Sustainable & ESG Education Initiative and

Best Thought Leadership Paper.

We were delighted to see a number of the funds held within the TAM ESG model portfolios up for an award, and even more delighted to see many of them win. These included the **Rathbone Ethical Bond Fund** which won the Best Sustainable & ESG Bond Fund award, the **Baillie Gifford Positive Change Fund** which won the Best Impact Fund award and the **Pictet Global Environmental Opportunities Fund** which won the Best Environmental/Climate Change Fund.

The outstanding performance of these funds is recognised in the performance of our portfolios that can be seen below.




Source: FE Analytics. Annualised performance against volatility from 1/10/16 - 30/9/20. Past Performance is not a guide to future returns.

A number of our other funds and fund management groups also made it as finalists within their individual categories, including:

- TwentyFour Sustainable Short Term Bond Income Fund – Best Newcomer
- EdenTree Amity Sterling Bond Fund – Best Sustainable & ESG Bond Fund
- BMO Global Asset Management, EdenTree Investment Management, Pictet Asset Management – Best Sustainable & ESG Fund Management Group of the Year

We are very pleased with these results and the overall success of fund providers and research teams in helping to push ESG investing into the mainstream through their outstanding work and dedication to driving positive change in the industry.

If you would like to discuss our ESG portfolios or current positioning further please do not hesitate to contact us.

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