

Columbia Threadneedle (Lux) Sustainable Outcomes Global Equity

At a glance

Our active global equity fund invests in high-quality companies that deliver both positive sustainable outcomes and financial returns. These two objectives work in harmony enabling you to invest in a better future.

Investment objective & policy

To generate long-term capital growth, deliver positive sustainable outcomes and outperform the MSCI AC World Index by investing in a diversified portfolio of competitively advantaged companies that display strong or improving environmental, social and governance (ESG) practices.

In line with its active management strategy, portfolio holdings may deviate significantly from those of the index.

The fund's sustainability related disclosures can be found on our website: www.columbiathreadneedle.com.

The decision to invest in the fund should also take into account any additional fund characteristics or objectives as set out in its Prospectus.



Pauline Grange
Portfolio Manager (since inception)

Key facts

Fund inception date:

19 May 2021¹

Typical fund holdings:

40 to 60 companies

Fund size: (as at 30.09.2021)

€159 million

SFDR:

Article 8*

*The Fund is categorised as one that promotes environmental or social characteristics under Article 8 of the EU Regulation 2019/2088 on sustainability-related disclosures in the financial services sector (SFDR).

Key reasons to invest

- 1. Clear sustainable objective:** The fund aims to provide twin benefits of positive sustainable outcomes and strong financial returns.
- 2. Differentiated quality approach:** We focus on quality companies that have robust competitive advantages, that deliver high returns and stable growth over the long term.
- 3. Doing good by the planet and society:** 100% of the portfolio is exposed to positive sustainable outcomes that help deliver solutions and contribute positively to the world's sustainability challenges.

Risks to be aware of

This fund is suitable for investors who can tolerate high levels of risk and volatility and have a long-term investment horizon. Investors could lose some or all their capital and should read the Prospectus for a full description of all risks.

Investment risks: Investment in equities, portfolio concentration, currencies and ESG criteria.

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

¹ Pauline Grange has managed the Columbia Threadneedle Sustainable Outcomes Global Equity strategy since inception in 2018.

Investment approach

The fund provides twin benefits of positive sustainable outcomes and strong financial returns, proving that these two objectives work in harmony and enables you to invest in a better future.

We've identified eight themes from the UN Sustainable Development Goals (SDGs), a set of targets adopted by United Nations Member States, that aim to tackle global challenges such as poverty, inequalities and climate change. Every company must earn revenue from activities aligned with one or more of these themes and be actively and intentionally contributing to a better future. We believe that companies that contribute positively to society and the planet not only

do the right thing but have the potential to be long-term industry winners and hence generate strong financial returns.

Our global equities team thoroughly analyses both fundamentals and ESG credentials, working closely with fundamental and responsible investment analysts to build a conviction portfolio of high quality, impactful companies. We invest in both the current sustainability champions as well as the potential future leaders. Active engagement is integral to this approach. Through it, we can drive change in companies, encouraging them to deliver greater positive contributions over time.

Our philosophy



- 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.



To find out more visit [columbiathreadneedle.com](https://www.columbiathreadneedle.com)



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