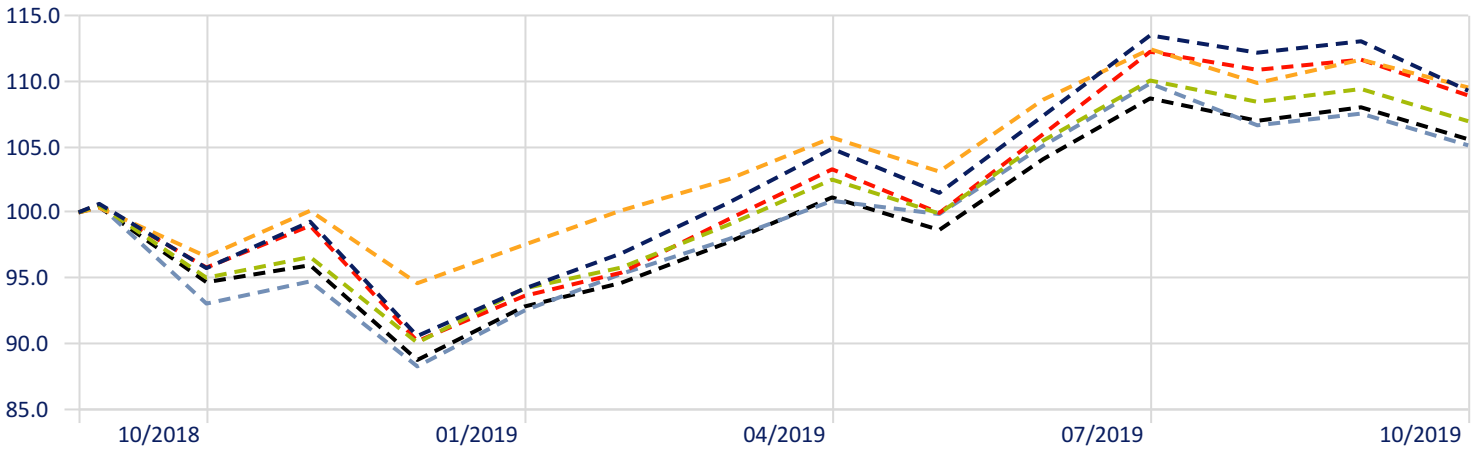
Concentric Financial Services Limited
Sustainable Investment Monthly Snapshot
October 2019

Investment Growth

Time Period: 25/09/2018 to 31/10/2019



Morningstar Minority Empowerment TR USD
Morningstar Gbl Mkts Low Carb Rsk GR USD
Morningstar Societal Development GR USD
Morningstar Women's Empowerment TR USD
Morningstar Gbl Mkts Sust Leaders GR USD
Morningstar DM GR USD

Trailing Returns

Data Point: Return Calculation Benchmark: Morningstar DM GR USD

	1 Month	YTD	1 Year	3 Years	5 Years
Morningstar Minority Empowerment TR USD	-3.33	20.66	14.14	—	—
Morningstar Gbl Mkts Low Carb Rsk GR USD	-2.25	18.76	12.57	10.32	12.94
Morningstar Societal Development GR USD	-1.90	15.79	13.35	—	—
Morningstar Women's Empowerment TR USD	-2.45	20.79	13.71	—	—
Morningstar Gbl Mkts Sust Leaders GR USD	-2.25	19.11	12.98	9.42	12.36
Morningstar DM GR USD	-2.26	18.97	11.52	10.10	12.93

Sustainable Investmnent in the news

Cerno Capiltal publish performance data on their Global Leaders Strategy on www.mpindices.com - The Cerno Global Leaders strategy invests in global companies with sustainable competitive advantages delivering above average returns. Its target is to deliver performance in excess of MSCI World Total Return (GBP) on a 3 year rolling basis.

The strategy holds 25-30 securities, equally weighted, selected according to a distinct investment thesis that accents industry structure, the sustenance of return on capital and secular growth.

Stonehage Fleming launches sustainable investment range - The investment division of one of the world's largest international family offices, is to launch a range of sustainable investment funds. These portfolios will utilise the group's existing multi-asset investment process, with the same investment and performance objectives, but socially responsible objectives will also be applied.

Guy Hudson, head of group marketing at Stonehage Fleming, cited proprietary research showing 75% of investors wanted their values to be reflected in their portfolios but only 21% were actively taking this approach.

Hudson said the group saw socially responsible investing as a "vital expression of our clients' 'social capital', or the way they engage with and contribute to wider society".

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Concentric Financial Services Limited is regulated by the Jersey Financial Services Commission to conduct investment business under the Financial Services (Jersey) Law 1998.