

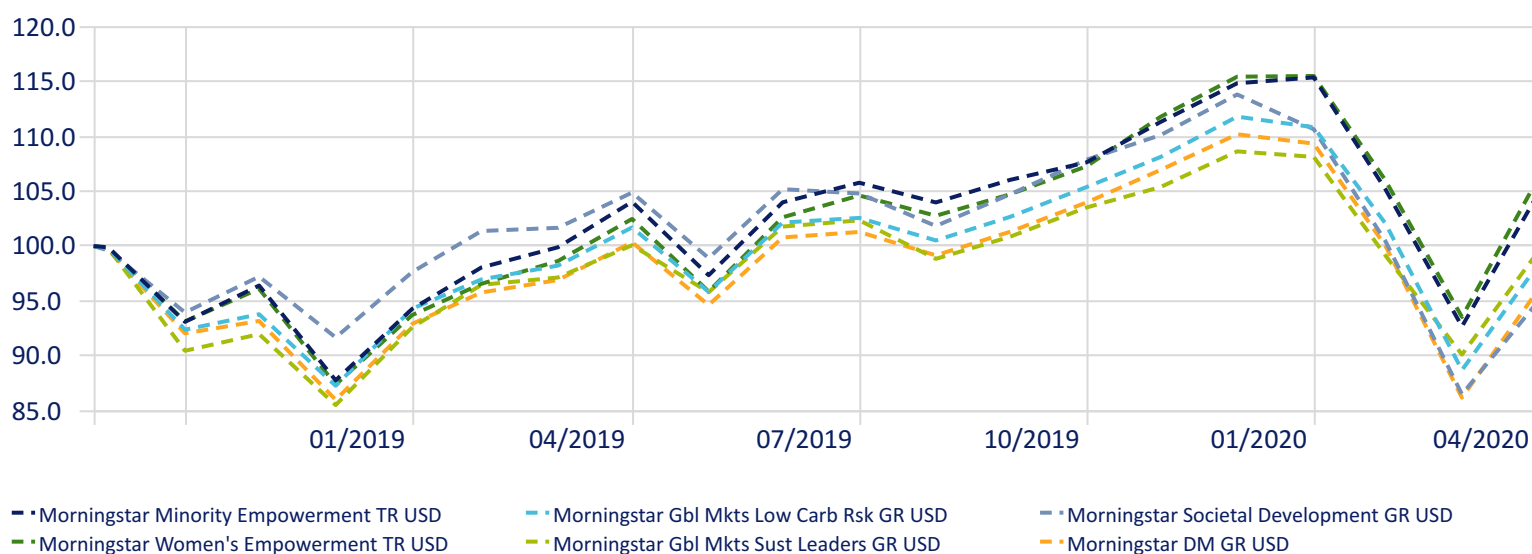
# Concentric Financial Services Limited

## Sustainable Investment Monthly Snapshot

April 2020

### Investment Growth

Time Period: 25/09/2018 to 30/04/2020



### Trailing Returns

	1 Month	YTD	1 Year (Annualised)	3 Years (Annualised)	5 Years (Annualised)
Morningstar Minority Empowerment TR USD	12.68	-9.04	0.39	—	—
Morningstar Gbl Mkts Low Carb Rsk GR USD	10.52	-12.29	-3.59	5.63	5.49
Morningstar Societal Development GR USD	9.51	-16.75	-9.65	—	—
Morningstar Women's Empowerment TR USD	13.13	-8.30	3.28	—	—
Morningstar Gbl Mkts Sust Leaders GR USD	10.11	-8.63	-0.84	5.97	5.95
Morningstar DM GR USD	11.07	-13.09	-4.57	4.98	5.23

### Sustainable Investment in the news

**Morningstar acquires Sustainalytics** - Morningstar has bought Sustainalytics outright from its current 40% ownership.

The deal is worth around €55m valuing Sustainalytics at €170m. Sustainalytics currently offers data on 40,000 companies worldwide and ratings on 20,000 companies and on 172 countries.\*

**S&P launches climate indices** - S&P Dow Jones Indices has announced the launch of two climate related equity indices.

The S&P Eurozone LargeMidCap Paris- Aligned Climate Index and the S&P Eurozone LargeMidCap Climate Transition Index incorporate climate objectives and minimum standards for the EU Paris-Aligned and Climate Transition Benchmark. S&P say the indices apply analytics from Trucost, part of S&P Global and measure the performance of eligible equity securities from the S&P Eurozone LargeMidCap Index. These are selected and weighted to be meet the 1.5°C global warming climate objective\*\*

Data sources: \*www.morningstar.com \*\*www.internationalinvestment.net

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