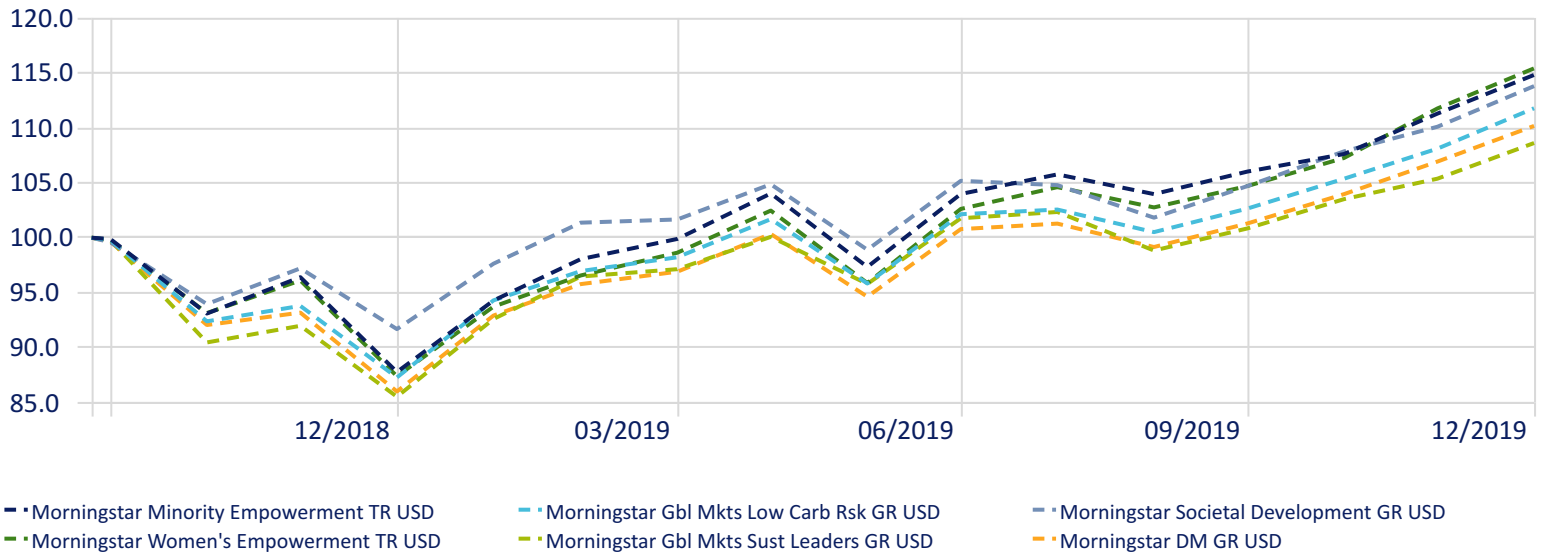
Concentric Financial Services Limited

Sustainable Investment Monthly Snapshot

December 2019

Investment Growth

Time Period: 25/09/2018 to 31/12/2019



Trailing Returns

	1 Month	YTD	1 Year (Annualised)	3 Years (Annualised)	5 Years (Annualised)
Morningstar Minority Empowerment TR USD	3.16	30.79	30.79	—	—
Morningstar Gbl Mkts Low Carb Rsk GR USD	3.40	28.06	28.06	13.53	9.44
Morningstar Societal Development GR USD	3.36	24.12	24.12	—	—
Morningstar Women's Empowerment TR USD	3.26	32.05	32.05	—	—
Morningstar Gbl Mkts Sust Leaders GR USD	3.08	26.99	26.99	11.90	8.81
Morningstar DM GR USD	3.03	28.10	28.10	12.90	9.30

Sustainable Investment in the news

Fidelity launches water fund in UK - Fidelity International has unveiled a UK-based sustainable water & waste fund after the original Luxembourg-domiciled strategy took in $1bn of investor money and made strong returns in its first year after launch.*

PIMCO launches climate bond fund - Pimco has launched its first climate bond fund aimed at fighting climate change. The fund offers investors a global multi-sector bond portfolio that supports climate change solutions while seeking to minimize exposure to climate-related risk.**

EU agrees green bond rules - The EU has agreed new rules on which financial products can be labeled as green. The rules will include definitions for sustainable investment across the EU making the region a world leader in sustainable finance, according to EU lawmaker Bas Eickhout.***

Data sources: * www.trustnet.com ** www.pimco.co.uk *** www.ft.com

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