

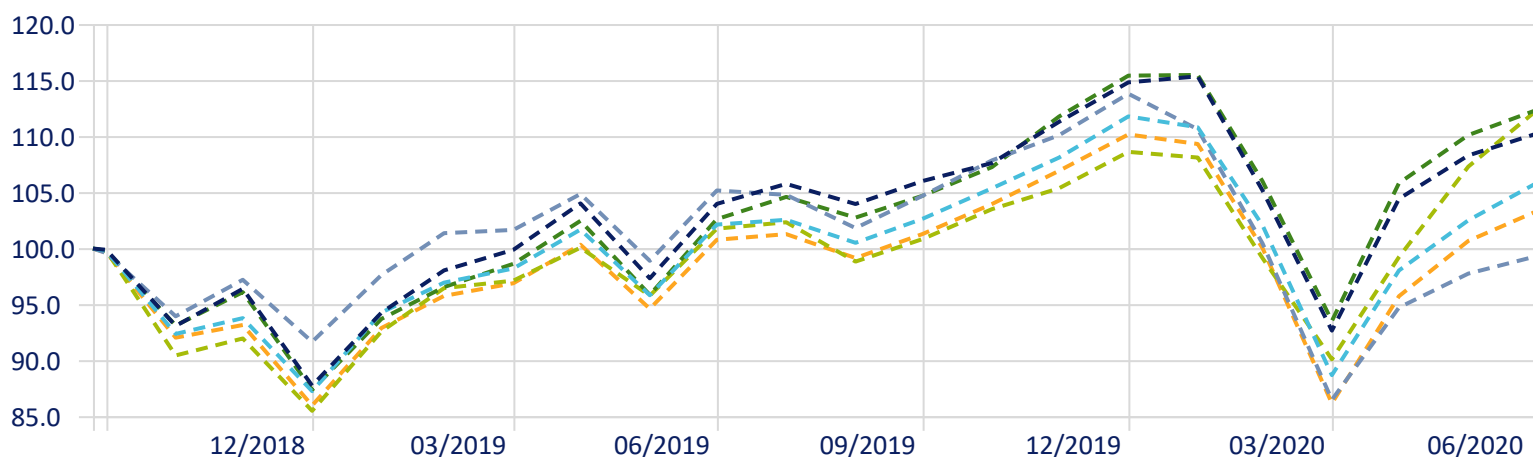
Concentric Financial Services Limited

Sustainable Investment Monthly Snapshot

June 2020

Investment Growth

Time Period: 25/09/2018 to 30/06/2020



--- 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

	1 Month	YTD	1 Year (Annualised)	3 Years (Annualised)	5 Years (Annualised)
Morningstar Minority Empowerment TR USD	1.76	-4.01	5.99	—	—
Morningstar Gbl Mkts Low Carb Rsk GR USD	3.18	-5.37	3.56	7.32	7.50
Morningstar Societal Development GR USD	1.56	-12.75	-5.59	—	—
Morningstar Women's Empowerment TR USD	1.99	-2.69	9.44	—	—
Morningstar Gbl Mkts Sust Leaders GR USD	4.59	3.32	10.27	9.70	9.26
Morningstar DM GR USD	2.58	-6.26	2.47	6.71	7.19

Sustainable Investment in the news

Impact investing set to surge in Australia - according to a report by the Responsible Investment Association Australasia. In its Benchmarking Impact 2020 report, the RIAA predicts the market will reach \$100 billion by 2025 and says the market is now worth \$19.9 billion as Australian investors have increased their exposures to clean energy, housing, education, health and conservation.*

The Sustainability Linked Bond Principles have been launched for bond issuers - They are voluntary guidelines where the bond issuer commits to predefined Sustainability Performance Targets. These include the selection of key performance indicators, the calibration of sustainability performance targets, as well as details of bond characteristics, reporting and verification.

While the Green Bond Principles remained unchanged, the Social Bond Principles were updated to expand project categories and target population.**

Data sources: *www.responsibleinvestment.org **www.icmagroup.org

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

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