



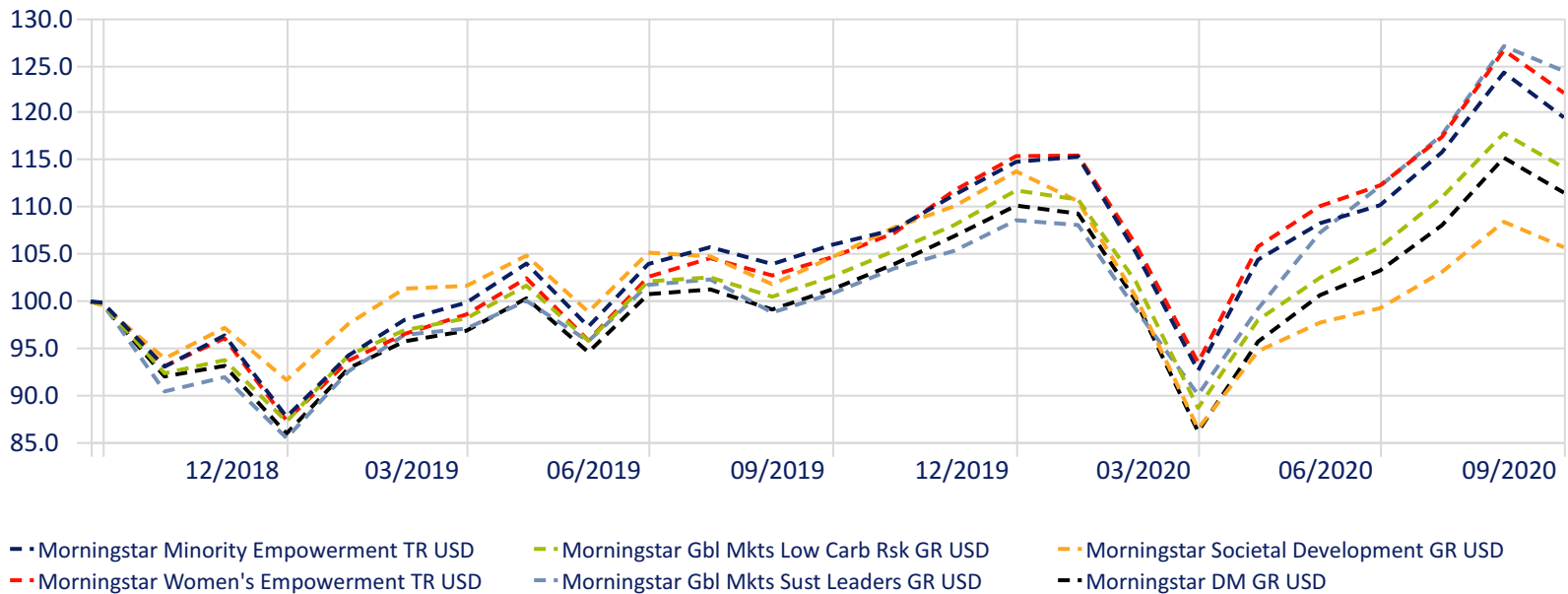
# Concentric Financial Services Limited

## Sustainable Investment Monthly Snapshot

September 2020

### Investment Growth

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



### Trailing Returns

Data Point: Return Calculation Benchmark: Morningstar DM GR USD

	1 Month	YTD	1 Year	3 Years (Annualised)	5 Years (Annualised)
Morningstar Minority Empowerment TR USD	-3.83	4.09	12.73	—	—
Morningstar Gbl Mkts Low Carb Rsk GR USD	-3.09	2.15	11.24	8.26	11.21
Morningstar Societal Development GR USD	-2.49	-7.07	1.00	—	—
Morningstar Women's Empowerment TR USD	-3.58	5.81	16.63	—	—
Morningstar Gbl Mkts Sust Leaders GR USD	-2.08	14.56	23.39	11.51	13.22
Morningstar DM GR USD	-3.21	1.24	10.11	7.69	10.76

### Sustainable Investment in the news

**Five firms removed from UN PRI** - Five investment firms have been removed from the United Nations Principles for Responsible Investment for failing to meet its minimum requirements. The PRI said it now plans to toughen membership requirements further and will launch a consultation at a meeting this month. Proposed changes include requiring firms' responsible investment policies to cover 90% of assets and making that policy public. \*

**Big Four firms release ESG reporting metrics** - The metrics have been released by the World Economic Forum in conjunction with the fourth annual Sustainable Development Impact Summit. The metrics were developed in collaboration with the Big Four firms, Deloitte, EY, KPMG and PwC, and aim to provide a common set of existing disclosures that lead toward a more coherent, comprehensive global corporate reporting system. The ESG metrics are organized around governance, planet, people and prosperity and look to align existing standards to enable companies to collectively report nonfinancial disclosures.

Data sources: \*www.business-times.com \*\*www.ft.com

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