



Responsible Investing and Sustainability at Investec Wealth & Investment



Responsible Investing at IW&I

We have a responsibility to preserve and grow the wealth that is entrusted to us over the long term, and we understand that we need to do this by investing responsibly on your behalf.

Environmental, Social and Governance (ESG) considerations have long been embedded into our investment processes, as has our active engagement with the businesses that we include in client portfolios.

ESG Integration

Our Research Team incorporate ESG factors into our investment analysis as standard across all asset classes.

Within our direct equity and fixed income coverage, our in-depth financial analysis is strengthened by the use of Sustainalytics, a global leader in ESG research and risk metrics. This provides information on non-financial measures such as a company's environmental credentials, business ethics, and exposure to human rights issues.

Our collective research analysis covers fixed income, equities, property, infrastructure, and other alternative assets. A key component of our approach here is to establish a thorough understanding of how managers incorporate ESG into their funds. This information is sourced through proprietary questionnaires and face-to-face meetings with managers.

Voting and Engagement

We also exercise voting rights on behalf of our discretionary clients, and will engage with the boards of companies where appropriate. We partner with Institutional Shareholder Services (ISS), which provides us with governance and voting analysis as an input into our decision making, with our overall voting and engagement activities overseen by a Corporate Governance Committee.

[You can find out more about our ESG and voting policies on our website.](#)

Tailoring Your Portfolios

There are a number of ways that we can tailor portfolios to reflect your preferences:



Sustainability Focus

We can concentrate your individual equity holdings towards those which have higher ESG ratings, or use funds which focus their portfolios on more ESG-sustainable businesses. Our Research Team maintain a list of best-in-class funds which have a good ESG rating, sustainable focus, or which aim to generate a positive impact. This list sits in line with our central views and can be used to focus your portfolio accordingly.



Specialist Focus

IW&I maintain a broad list of investments, including names with exposure to areas that have a positive ESG impact, such as environmental funds and social housing investment trusts. We can incorporate these names into your portfolio if you wish to have more specific exposure to these type of themes.



Ethical Focus

We can utilise a screening service called Ethical Screening that can identify companies engaged in activities which may conflict with your values, so they can be excluded from your portfolio. Exclusions can only be applied where direct equities are held within your portfolio.

Your Investment Manager would be more than happy to discuss the best approach to creating a tailored portfolio to reflect your views and values.

The value of investments and the income derived from them can go down as well as up and you may not get back your initial investment.

Sustainability at Investec

We are committed to delivering exceptional service to our clients, creating long-term value for our shareholders and contributing meaningfully to our people, communities and the planet.

Our business decisions are driven by our values and the intention to live in society, and not off it. As an Investec client, you will be dealing with a sustainable, financially resilient business, which is here for the long term.

We pride ourselves on investing in our people, supporting our communities, and caring for our environment.

In the past year*

£14.2 mn

Invested in our people and growing talent and leadership.

£9.8 mn

Contributed to society through our community programmes.

555

UK staff volunteered a total of 3,217 hours through our community partnerships.

* Financial year 2019/20

We aim to help solve global, social and environmental issues locally and are guided by our core commitments to the three E's; Education, Entrepreneurship and the Environment.



Education

1,780 Arrival Education learners have been supported in the UK in the past 12 years.



Entrepreneurship

Since 2011 we've helped launch 47 new social businesses, supporting the creation of more than 300 jobs, and creating £5mn combined annual turnover.



Environment

We've achieved net-zero direct carbon emissions for the 2018/19 financial year and committed to ongoing carbon neutrality.

You can learn more about our commitment to sustainability on our [website](#)



Belfast	02890 321002	Edinburgh	0131 226 5000	Liverpool	0151 227 2030
Birmingham	0121 232 0700	Exeter	01392 204404	London	020 7597 1234
Bournemouth	01202 208100	Glasgow	0141 333 9323	Manchester	0161 832 6868
Bristol	01172 444 860	Guildford	01483 304707	Reigate	01737 224223
Cheltenham	01242 514756	Leeds	0113 245 4488	Sheffield	0114 275 5100

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