

	Ethically Screened Fund Options			SRI Themed Fund Options			Engaged Funds or Fund Management Companies		
	SRI Style	Faith Based	Negative Ethical	Ethically Balanced	Sustainability Theme	Environmental Theme	Social Theme	Responsible Ownership	ESG Integration
<b>Client aims:</b>		Funds that <b>avoid companies</b> or sectors that conflict with the values of a named religion.	Funds that (primarily) focus on <b>avoiding companies</b> based on negative ethical (and other) exclusions. Criteria and depth of screens varies.	Funds that <b>balance diverse</b> (often complex) <b>positive and negative issues</b> . Criteria vary. May favour 'best in sector' companies.	Funds that focus on <b>sustainability themes</b> , issues & opportunities - often alongside ethical criteria. Strategies vary.	Funds that focus on <b>environmental themes</b> , issues & opportunities - sometimes alongside ethical criteria. May focus on a single issue or sector.	Funds that focus on <b>social themes</b> , issues, opportunities and outcomes. (ie. people related).	Investor stewardship strategies applied to all or some funds. Aimed at <b>encouraging better business practices</b> through voting and dialogue. Strategies vary.	Additional environmental, social and governance research carried out for some or all funds primarily to help <b>reduce risk</b> . Strategies vary.
<b>To reflect personal ETHICAL VALUES</b> eg. relating to tobacco, armaments, alcohol, gambling, animal testing – typically in addition to environmental and social issues.		Yes/Always	Yes/Always	Yes/Always	For most funds/Often	For most funds/Often	For most funds/Often	No/Very unlikely	No/Very unlikely
<b>To take areas like sustainability, environmental and social issues seriously because it makes FINANCIAL SENSE to do so.</b>		No/Very unlikely	For most funds/Often	Yes/Always	Yes/Always	Yes/Always	Yes/Always	Yes/Always	Yes/Always
<b>To help effect POSITIVE CHANGE</b> through where they invest – to have a positive impact by investing in well run, forward looking, environmentally and socially aware companies.		No/Very unlikely	For most funds/Often	For most funds/Often	Yes/Always	Yes/Always	Yes/Always	For most funds/Often	No/Very unlikely

- Yes/Always
- For most funds/Often
- No/Very unlikely