**Fund EcoMarket SRI Styles**

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| **SRI Style** | **Description** | **Y / N** | **Notes to adviser / Questions** |
| [**Sustainable Style Funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/sustainability-select/) | Sustainable Style funds focus significantly on (environmental and social) sustainability issues, opportunities and themes when selecting investments. These funds tend to have forward looking strategies, favouring companies and other assets that show ‘sustainability leadership’, are ‘solutions companies’ or are helping to facilitate the ‘transition’ to more sustainable lifestyles. They may also have ‘ethical’ exclusion criteria and encourage positive change through stewardship activity. |  |  |
| [**Environmental Style Funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/environmental-focus/) | Environmental Style Funds significantly integrate environmental issues into investment strategies. Their focus is often around longer term environmental and resource related issues, risks and opportunities. Some funds are very broad, others focus on a single issue, industry or resource. They may have ‘ethical’ exclusion criteria and also encourage positive change through stewardship activity. |  |  |
| [**Social Style Funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/social-focus/) | [**Social Style funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/social-focus/) focus on ‘people issues’, investing in assets that help to address social challenges such as employment, education, housing and other basic necessities of life. Strategies vary, some invest in an individual sector others invest more broadly. |  |  |
| [**Ethical Style Funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/ethical/) | These funds focus on ‘values based’ issues almost always alongside considering ESG (environmental, social and governance) and sustainability related issues.  These funds set out where they aim to invest and avoid in their published criteria. Some have extensive exclusions others may make more balanced decisions – balancing pros and cons.  The most common exclusions are armaments and tobacco.  Negative screens often operate alongside positive criteria. Strategies vary.  These strategies are often complemented by responsible ownership (stewardship) activity. |  |  |
| [**Faith Based Funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/faith-based/) | Funds that invest in line with specific religious principles eg Shariah Law. (Strategies vary). |  |  |
| [**Sustainability Tilt Funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/sustainability-tilted-funds/) | [**Sustainability Tilted funds**](https://fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/sustainability-tilted-funds/) integrate (environmental and social) sustainability considerations into their investment processes, favouring – being ‘overweight’ in – companies the managers believe have higher standards and being ‘underweight’ (invested less in) companies with lower sustainability standards. This means they are likely to invest in almost all types of companies – potentially including assets some clients will view as controversial. They may also have ‘ethical’ exclusion criteria that remove certain companies or asset types. They may also encourage positive change through stewardship activity – to a greater or lesser extent. |  |  |
| [**ESG Plus funds**](https://www.fundecomarket.co.uk/fund-ecomarket-help/sri-styles-directory/esg-plus/) | ESG Plus funds have environmental, social and governance risk mitigation strategies, often alongside other strategies which demonstrate the fund is intended for clients with an interest in ESG issues. They may have responsible ownership strategies that encourage higher standards and/or exclusion criteria. These funds may hold assets some clients review as controversial. Strategies vary. See fund entries for further information |  |  |
| **Limited Exclusions Funds**  | Limited Exclusions our classification for funds that exclude only a very small proportion of an index or allowable universe – and invest otherwise in a ‘conventional’ fashion.  Some funds exclude companies with the worst possible ESG scores, others may avoid a single industry eg tobacco or cluster munitions manufacturers.  These funds are significantly different from other SRI Styles as they have a very ‘limited’ impact on stock selection. |  |  |