

# Fusion ESG H5 | Sterling

### Key Data

**Currency:**  
Sterling | US Dollars | Euro

**Minimum Initial Investment:**  
£75,000 | \$150,000 | €150,000

**Annual Management Charge:**  
0.75%

**Investment Manager:**  
James Fitzpatrick  
Alena Vanek

**Investment Time Horizon:**  
5 Years (Rolling)

### Strategy Overview

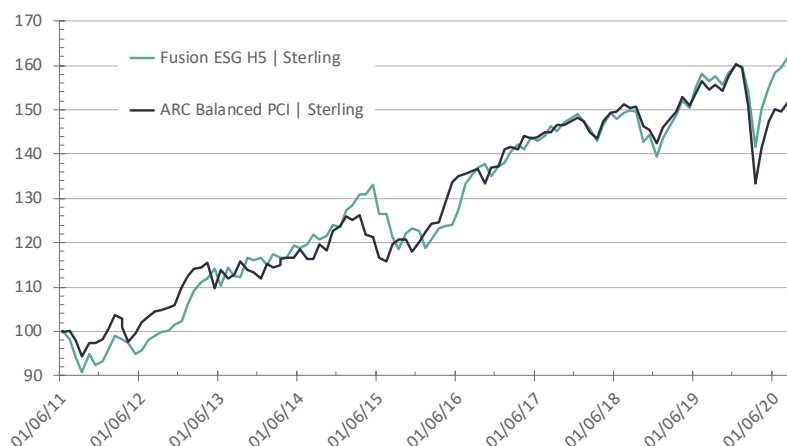
Fusion ESG is an actively managed portfolio consisting entirely of ESG funds with a focus on positive impact strategies and resource sustainability. Asset allocation is aligned to Capital International's H5 model strategy. The Fusion ESG portfolio selects global equity, bond and alternative managers that have established track records in managing ESG mandates. Fusion ESG has four key themes that invest in sectors with sustainable growth characteristics:

- Sustainable Agriculture,
- Clean Energy
- Healthy Living
- Water

For full details of Fusion ESG please refer to the [Fusion ESG Strategy and Asset Allocation](#) and [Fusion ESG Manager Focus List](#).

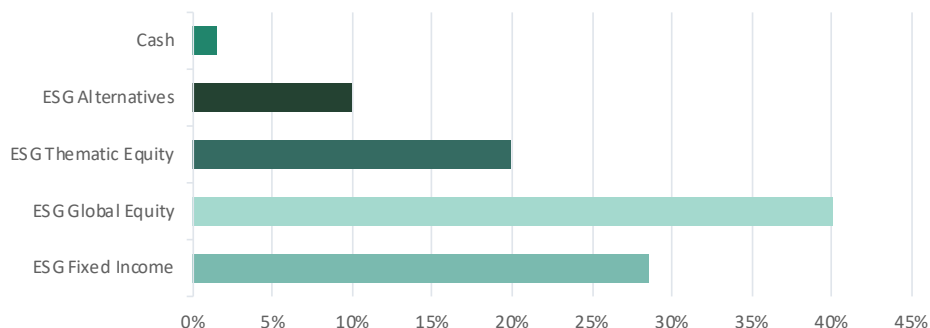
### Performance\*

	Fusion ESG H5   Sterling	ARC Balanced PCI   Sterling
1 mth	0.69%	-0.40%
3 mths	2.98%	0.76%
6 mths	15.14%	13.48%
1 year	3.51%	-2.79%
3 years	11.54%	4.42%
5 years	28.96%	30.57%
10 years	66.24%	51.27%



\*Fusion ESG H5 Sterling performance is net of fees and is compared to the ARC Balanced PCI Sterling benchmark.

### Asset Allocation



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