

Fusion ESG H5 | Sterling

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

Key Data

Currency:
Sterling | US Dollars | Euro

Minimum Initial Investment:
£100,000 | \$150,000 | €150,000

Annual Management Charge:
1.00%

Investment Manager:
James Fitzpatrick
Alena Vaneck

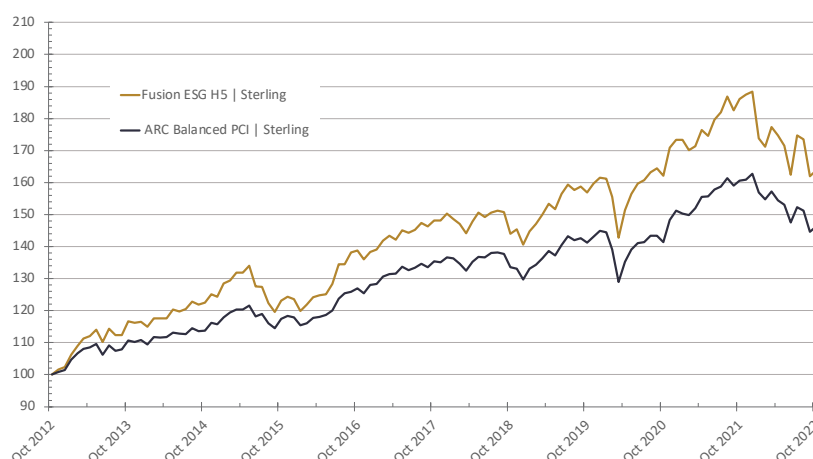
Investment Time Horizon:
5 Years (Rolling)

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

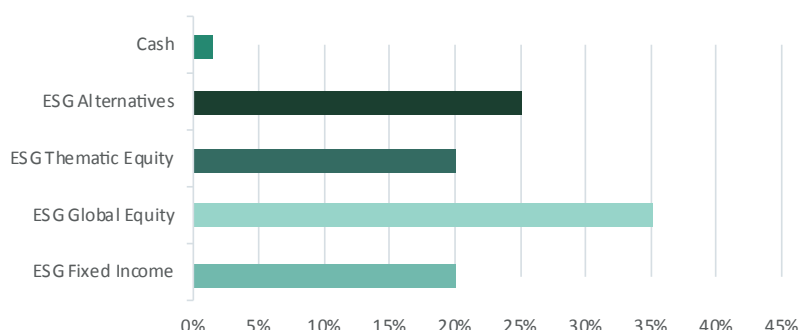
Performance*

	Fusion ESG H5 Sterling	ARC Balanced PCI Sterling
1 mth	1.1%	1.2%
3 mths	-6.3%	-4.0%
6 mths	-6.2%	-5.2%
1 year	-12.0%	-8.9%
3 years	4.4%	3.6%
5 years	10.5%	8.0%
10 years	63.8%	46.3%

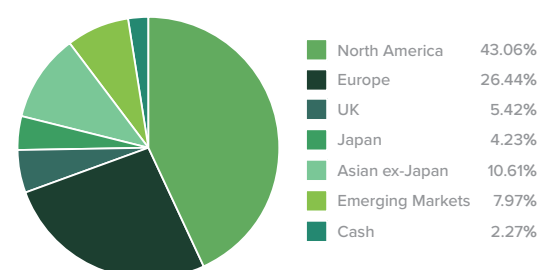
*Fusion ESG H5 Sterling performance is net of fees and is compared to the ARC Balanced PCI Sterling benchmark.



Asset Allocation



Geographical Asset Allocation



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