

The Epworth Climate Stewardship Fund for Charities

*Long term returns that
won't cost the earth*

Epworth
Investing with Christian ethics

UK charities told us they wanted an equity fund that would help save the planet while still aiming for good long term returns. So together we created one.

The Epworth Climate Stewardship Fund for Charities allows UK charities to invest in a way that tackles the climate emergency while still aiming for above market returns.

It's called the Epworth Climate Stewardship Fund because we are stewards of our investors' capital and this is reflected in how we invest. In this case, we created a climate investment solution that considers the impact that all of the companies we invest in have on our planet.

Protecting the planet while delivering good long term returns

The **Epworth Climate Stewardship Fund for Charities** will seek income and capital investment growth over a minimum period of 5 years through investing mainly in UK companies.

The Fund aims to have a carbon footprint substantially below that of the FTSE All Share Index (see www.epworthinvestment.co.uk for further information). It will look to invest with Christian ethics, seeking out companies that contribute to the transition to a lower carbon economy and engaging with portfolio companies to encourage action that reduces the risk of climate change.

It will exclude companies that extract or refine fossil fuels, those companies that have a material involvement in supplying

them with goods or services, as well as those that do not meet our bespoke Christian ethical screening process.

How to find out more

To find out more about the **Epworth Climate Stewardship Fund for Charities** and how you can help save the planet while aiming for good long term returns, please contact:

Mark O'Connor

Head of Business Development

mark.oconnor@epworthinvestment.co.uk

020 7496 3639

Christophe Borysiewicz

Head of Investment Management

christophe.borysiewicz@epworthinvestment.co.uk

020 7496 3646

“This Fund tackles the climate emergency head-on, letting UK charity trustees invest in a way that will help save the planet while targeting good long term investment returns.”

David Palmer,
Chief Executive, Epworth



Founded in 1996, Epworth is an investment manager dedicated to serving the needs of Churches and Charities. Epworth manages assets of around £1.2bn and is wholly owned by the Central Finance Board of the Methodist Church, established in 1960.

We aim to ensure that our long term investment portfolios are consistent with the Christian faith. We seek to use our influence to improve ethical standards in the businesses we invest in. We ask ourselves if the companies we are investing in are sustainable and operating in a way that is to the benefit of all stakeholders, including wider society. This is at the core of our ethical approach.

Epworth Investment Management Limited

2nd Floor
9 Bonhill Street
London EC2A 4PE

020 7496 3600

www.epworthinvestment.co.uk

Epworth

Investing with Christian ethics

Epworth Investment Management Limited (“Epworth”) is authorised and regulated by the Financial Conduct Authority (FCA Registered Number 175451). It is incorporated in England and Wales (Registered Number 3052894), with a registered office at 9 Bonhill Street, London EC2A 4PE and is wholly owned by the Central Finance Board of the Methodist Church. Epworth-managed funds are designed for long term investors. The value of units in funds can fall as well as rise and past performance is not a guide to future returns. The level of income is also variable and investing in Epworth funds will not be suitable for you if you cannot accept the possibility of capital losses or reduced income. Any estimates of future capital or income returns or details of past performance are for information purposes and are not to be relied on as a guide to future performance.