

# 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](http://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 us on

**020 7496 3636**

*“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.

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