

# Responsible Investment Policy

At Redmayne Bentley, we take an individual approach to investing and tailor our portfolios to suit your needs. For clients where responsible investing is a priority, we have the flexibility and depth of investment research to incorporate any preferences, and still build balanced and well diversified portfolios tailored to perform over the long term.



## INCORPORATING CLIENTS' VALUES

We believe that the portfolios we build and maintain for our clients take into account their views and preferences on areas of the markets that they do not want to directly invest in.

We want our clients' portfolios to reflect their fundamental values and beliefs.

As we take a truly bespoke approach to investing we can incorporate any specific restrictions that our clients have on their direct holdings, for example, in particular sectors such as tobacco and alcohol. Should clients choose to cover every aspect of their portfolio, we can also take into consideration ethical restrictions on collectives. We have a robust framework that means we are able to identify appropriate collectives where all of the below sectors are not permissible.



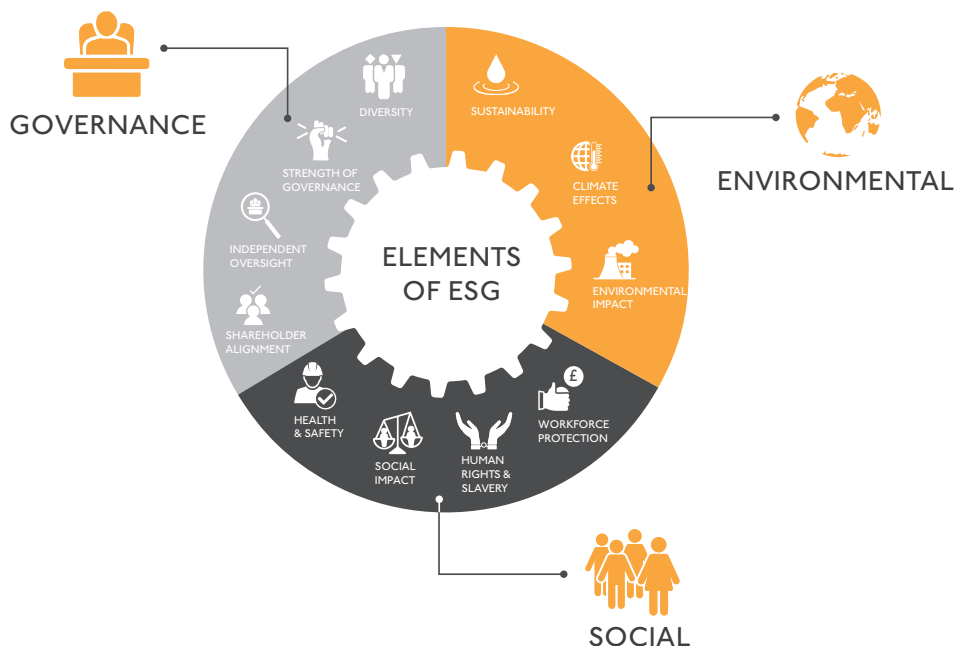
For institutional investors, we establish if they already have an investment policy in place which reflects their values. These may be detailed in nature and bespoke to the institution. For institutions that wish to develop such policies, we work with them to achieve the criteria they require. Ultimately, we then incorporate these values into their tailored portfolio, utilising our proprietary investment research.



## INVESTMENT RESEARCH

Within our investment research for various asset classes, we recognise the full spectrum of responsible investing qualities – Environmental, Social and Governance (ESG).

We have developed our own proprietary rating criteria, combining independent quantitative industry measures and our own qualitative overlay, in order to facilitate rigorous due diligence. The below highlights some of the areas where we focus our attention. This allows our dedicated *ESG Committee* to thoroughly research our investment ideas, which ultimately gives assurance that we are able to identify investments that align with our clients' specific values and preferences.





## PORTFOLIO RISK MANAGEMENT & RISK REPORTING

We integrate our clients' preferences through our portfolio risk management tool. We then construct and manage portfolios that consider all of our clients' specific needs. This enables us to constantly monitor clients' preferences and allows us to easily identify assets which do not align with clients' values.

Compliance officers oversee this process on an ongoing basis and dedicated risk management officers assess the level of breach, should it occur, and rectify it in a timely manner. All risk management issues are reported to the Executive Board for monthly review.



## VOTING & ENGAGEMENT

We participate in proxy voting on behalf of clients if they request that we do so. We reserve the right to engage with company management should we believe it is beneficial in supporting our investment thesis.