

PENGANA WHEB SUSTAINABLE IMPACT FUND

We are positive impact investors focused on the fundamental connection between long term positive change and long term investment growth.

OUR 9 SUSTAINABILITY THEMES

WHEB has identified critical environmental and social challenges facing the global population over the coming decades. The Fund invests in a diverse portfolio of high-quality global companies with strong growth characteristics which provide solutions to these sustainability challenges via nine sustainable investment themes:



CORE TO OUR INVESTMENT PHILOSOPHY

Investing in the opportunities created by the transition to a zero carbon and sustainable global economy.

Proven investment expertise

The Fund’s investment manager, WHEB, is world-renowned for its experience, innovation and thought leadership in sustainable investing and impact measurement.

Diversification

The portfolio will consist of 40-60 global companies, with usually no more than 3% of the Fund invested in each. This portfolio will have materially different exposures to broad global indices.

In-depth research

The WHEB investment team conducts deep fundamental research on companies meeting their criteria of producing goods and services to address sustainability challenges.

Measurement of investment impact

WHEB measures, calculates and reports on the extent of positive social and environmental impact associated with investments in the Fund.

IMPACT CALCULATOR

The impact calculator illustrates the underlying positive impact that companies in WHEB’s investment portfolio help create.

All products and services have an impact.

Some products have a negative impact, harming or undermining the social and environmental systems on which life depends. For others, impact is positive, helping to support or even restore the health of our systems.

We believe that understanding impact is becoming a ‘third dimension’ of investment expertise, alongside established disciplines in assessing investment risk and return. Our team of sustainability experts have developed bespoke tools that are used to analyse companies as part of our investment process.

Our interactive impact calculator helps you understand the impacts associated with an investment in the Pengana WHEB Sustainable Impact Fund.

ACCESS OUR LEADING IMPACT TOOLS AT:

<http://>



impact.pengana.com

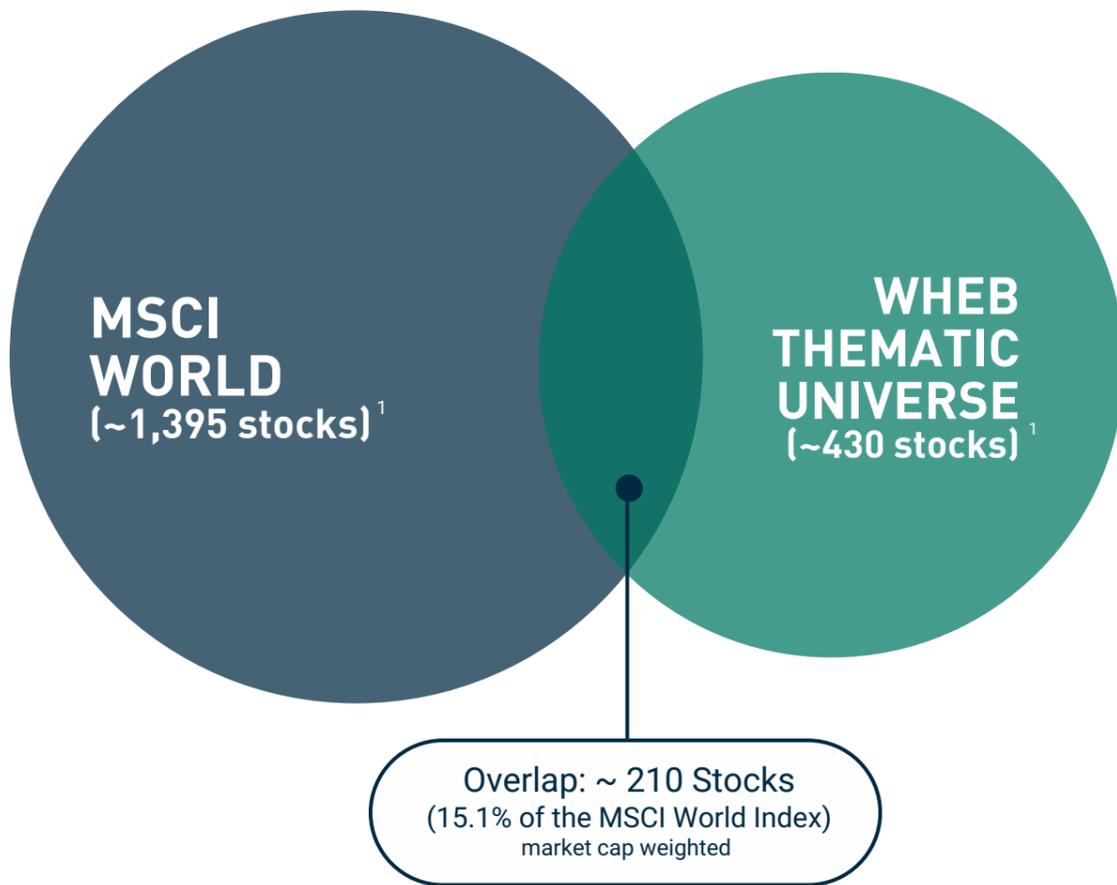
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A DIFFERENTIATED PORTFOLIO



ALIGNED WITH THE UNITED NATIONS SUSTAINABILITY DEVELOPMENT GOALS



¹ Source: WHEB as of 31/12/2024

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