

Investments and sustainability

Your guide to Omnis' approach



Omnis takes sustainability seriously, which is why it asks all its managers to consider environmental, social and governance (ESG) factors when making investment decisions. Omnis reviews the ESG characteristics of its funds on an ongoing basis and publishes an annual report to share key developments. Some of the highlights from the 2022 report are outlined below.

Omnis' core ESG beliefs

We're committed to being active investors and strive to be responsible stewards of our clients' investments within a framework of good governance and transparency. Core to our investment philosophy, is the belief that well-governed companies are better positioned to manage the risks and challenges inherent in business and to capture opportunities that help deliver sustainable growth. We firmly believe that effective stewardship will benefit companies, our clients and the economy as a whole.

Our approach

- All our managers must follow the United Nations Principle of Responsible Investing and the UK Stewardship Code.
- All our managers exclude some industries, such as controversial weapons, from the fund.
- All our managers **must** consider ESG factors when making investment decisions.
- We **do not** mandate our managers on how to implement such factors and encourage each of them to use their own approaches.

So how responsible are our funds?

Our independent consultants, Fundhouse, score our funds on an ESG basis from Excellent to Requires improvement:

1	2	3
Requires improvement	Good	Excellent
0 funds	15 funds	3 funds

Individual fund scores and exclusions are available [here](#).

The full report

Our full ESG report is now available and can be read [here](#).

www.omnisinvestments.com

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Spotlight on climate change

COP26 | Glasgow



Listen to our podcast [here](#)

<1.5°C



Limit temperature rise

90% of the world*



now covered by 'net zero' commitments

*as measured by GDP

\$100bn per year



Amount of money developed countries will channel to climate solutions for developing countries

Responsibility at the core of our business

The Openwork Partnership has been working to align its activities with our responsible investing credentials, including:

- Environmental initiatives to limit our impact on climate change
- Embedding colleagues wellbeing and diversity into everything we do
- Supporting our communities through the Openwork Foundation, which has donated over £21m to good causes since launch.

Bringing it to life

Scores don't tell you the full story – [here](#) we share some examples of how our managers consider ESG, through meeting companies, engaging with them and assessing the impact of sustainability on the value of the business they are looking to invest in.

For more information, please contact your financial adviser.