

# CT (Lux) SDG Engagement Global Equity

## At a glance

By investing in quality companies and using the Sustainable Development Goals (SDGs) as an engagement framework, we believe we can contribute to building a more sustainable world.

## Investment objective & policy

The objective of the fund is to invest in a portfolio of global small and mid-cap companies, for which we can define clear and targeted SDG engagement agendas. We aim to deliver long-term capital growth and outperformance of the MSCI ACWI SMID Cap Index over rolling 3-year periods.

In line with its active management strategy, portfolio holdings may deviate significantly from those of the index.

## Risks

This fund is suitable for investors who can tolerate high levels of risk and volatility and have a long-term investment horizon. An investment concerns the acquisition of units or shares in a fund, and not underlying assets such as buildings or shares of a company, as these are only the underlying assets owned by the fund. Investors could lose some or all their capital and should read the Prospectus for a full description of all risks.

**Investment risks:** Investment in equities, smaller companies and Environmental, Social and Governance (ESG) criteria.

**Associated risks:** Screening out sectors or companies may result in less diversification and therefore more volatility.

“We believe that the power of active capital can be harnessed to progress a more sustainable future, and that the SDGs can be used by investors as a roadmap to a better future, by investing in, and engaging with, a highly differentiated selection of global small-mid cap companies.” – **Jamie Jenkins**

## Key facts

**Fund inception date:** 1 March 2019

**Typical fund holdings:** 40 to 60 companies

**Fund size:** \$1.0 billion (as at 31.12.2024)

**SFDR:** Article 9\*



**Jamie Jenkins**

Portfolio Manager (since inception)

## Key reasons to invest

**1 Investing to improve:** Individuals increasingly want to make a positive impact, aligning investment decisions with core values. This is exactly what the fund is designed to achieve.

**2 Quality matters:** The bar we set when investing is high. Alongside strict criteria around the quality and value of a company, there must be clear opportunity for SDG-linked engagement.

**3 Measuring our impact:** For each company in the portfolio, we monitor and measure the impact of our dialogue around defined SDG targets. We want to see improvement and continually assess the progress each company is making.

\*The Fund promotes environmental or social characteristics under Article 9 of the EU Regulation 2019/2088 on sustainability-related disclosures in the financial services sector (SFDR). The decision to invest in the promoted fund should also take into account all the characteristics or objectives of the promoted fund as described in its prospectus. The fund's sustainability related disclosures can be found on our website [columbiathreadneedle.com](https://columbiathreadneedle.com).

# Investment approach

The CT (Lux) SDG Engagement Global Equity fund draws on our wider investment platform and combines expertise in active equity management and responsible investment. We adopt a primarily fundamental, bottom-up approach, with low turnover, resulting in a concentrated portfolio investing in 40-60 stocks with a long-term investment horizon, enabling us to make positive change by our engagement. Seeking investment in quality companies, alongside factors like competitive advantage, strong and engageable management, we have a disciplined approach to valuation.

The fund showcases what specialist ESG global equity strategies can achieve, and also offers a differentiated style exposure to ESG investors. From inception we have actively embraced, and maintained, a low beta, low volatility, high profitability, mid-cap tilt as we believe this can deliver a strong risk-adjusted return profile.

Close collaboration between the Global Equities and Responsible Investment teams is at the heart of our process, working together to assess engageability of companies and co-creating intentional engagement agendas prior to investing, which target specific SDGs with specific performance indicators.

## There is an ever-growing demand to align our investments with our values

- **\$5-7 trillion per year** needed to meet the UN SDGs, but the current funding gap is estimated at **\$2.5 trillion**
- Achieving the SDGs could create over **\$12 trillion in market opportunities by 2030**
- Harnessing the power of capital and active ownership to target the SDGs, deliver **real world impact**, and progress towards a **more sustainable future**
- Using the SDGs as a **common language/framework** to engage with companies, **measure and communicate** our impact with investors



Source: Columbia Threadneedle Investments.



To find out more visit [columbiathreadneedle.com](https://columbiathreadneedle.com)



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CTEA7586368.2 | WF2654248 (Valid from 01.25 to 12.25)