

# CT (Lux) Sustainable Outcomes Global Equity

## At a glance

Our active global equity fund invests in high-quality companies that aim to deliver both strong financial returns and positive sustainable outcomes. These two objectives work in harmony enabling you to invest in a better future.

## Investment objective & policy

To generate long-term capital growth, deliver positive sustainable outcomes and outperform the MSCI AC World Index by investing in a diversified portfolio of competitively advantaged companies that display strong or improving environmental, social and governance (ESG) practices.

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. 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, portfolio concentration, currencies and ESG criteria.

“In a world of societal and environmental change, companies that invest and innovate for a more sustainable future not only support the planet and its inhabitants but also their own ability to generate strong financial returns.”

**Pauline Grange**

## Key facts

**Fund inception date:** 19 May 2021

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

**Fund size:** \$235 million (as at 31.12.2024)

**SFDR:** Article 9\*



**Pauline Grange**

Portfolio Manager of the Columbia Threadneedle Sustainable Outcomes Global Equity strategy since inception in 2018.

## Key reasons to invest

- 1 Investing in competitively advantaged companies that contribute materially to sustainable outcomes through both sales and investment.
- 2 Concentrated 40-60 stock portfolio unconstrained by sector and region.
- 3 Stock selection drives outperformance in both rising and falling markets.

\* 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

Bottom-up stock selection is the main driver of our clearly defined, repeatable process. We look for high-quality companies with strong competitive advantages that can generate high or improving returns and actively contribute to a more sustainable future. The ability of these companies to sustain high return on invested capital and above-average growth is often underestimated, meaning potential long-term winners trade at a discount to their intrinsic value. It's this inefficiency that we look to exploit.

Using the United Nations Sustainable Development Goals (SDGs) as a guide, we focus on eight sustainability themes most relevant to investments. We look to identify companies that can deliver on these themes, with the aim of generating strong returns alongside supporting sustainable development.

To help us identify relevant opportunities, we have developed a framework that, for each company, assesses their impact,

intentionality and integrity. We focus on companies that are delivering a product or service that has a positive impact on the environment and/or society. This is what we refer to as 'enterprise impact', that is impact delivered through the company's operations.

We must also see clear evidence of intent; in other words, investment directed towards growing that impact. And while our focus is on the positive outcomes, we also set a minimum threshold in what we are looking for. We do not invest in companies that score poorly on ESG matters, nor do we invest in those misaligned with our sustainable values. They must operate with integrity.

Active engagement is integral our approach as it allows us to clarify a company's contribution to sustainable outcomes and also its intent. We can also help them on that journey and drive positive change and impact.

## Our philosophy

- Companies that contribute positively to our sustainable themes can enjoy secular growth and strong competitive moats in the long term.
- Strong and/or improving ESG credentials are a key indicator of the quality of a company and its management.
- Companies with an established/improving competitive advantage can sustain/grow their returns longer than the market anticipates.



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



Important information: Your capital is at risk. This financial promotion is issued for marketing and information purposes only by Columbia Threadneedle Investments.

The Fund is a sub-fund of Columbia Threadneedle (Lux) II, a Luxembourg domiciled investment company with variable capital ("SICAV"), managed by Threadneedle Management Luxembourg S.A..

The SICAV's current Prospectus, the Key Investor Information Document (KIID)/Key Information Document (KID) and the summary of investor rights are available in English and/ or in local languages (where applicable) from the Management Company Threadneedle Management Luxembourg S.A., International Financial Data Services (Luxembourg) S.A., your financial advisor and/ or on our website [www.columbiathreadneedle.com](https://www.columbiathreadneedle.com). Threadneedle Management Luxembourg S.A. may decide to terminate the arrangements made for the marketing of the SICAV. Pursuant to article 1:107 of the Act of Financial Supervision, the sub-fund is included in the register that is kept by the AFM. Past performance is calculated according to the BVI method in Germany.

Columbia Threadneedle (Lux) II is a collective investment scheme pursuant to Section 235 of the United Kingdom's Financial Services and Markets Act 2000, as amended ("FSMA"). Notification has been made to the FCA under the National Private Placement Regime (NPPR) to market this fund in the UK. Prospective Investors are advised that all, or most, of the protections afforded by the United Kingdom regulatory system will not apply to an investment in the Fund and that compensation will not be available under the United Kingdom Financial Services Compensation Scheme.

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In Spain, Columbia Threadneedle (Lux) II is registered with the CNMV under No. 2022. The Fund is a non-Spanish collective investment scheme duly registered with the CNMV for marketing in Spain. The fund should be subscribed to through locally authorised appointed distributors. Investors must read the relevant Prospectus and KID for each fund they want to invest before subscribing. All other statutory documentation, as well as the NAV can be obtained from [www.columbiathreadneedle.com](https://www.columbiathreadneedle.com).

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