



BROOKS MACDONALD

Brooks Macdonald

[Brooks Macdonald Group plc](#), through its various subsidiaries, provides leading investment management services in the UK and internationally. The Group, which was founded in 1991 and began trading on AIM in 2005, had Discretionary Funds under Management of £16.2 billion as at 31 December 2022.

Brooks Macdonald offers a range of investment management services to private high net worth individuals, pension funds, institutions, and trusts. The Group also offers offshore investment management and acts as fund manager to a regulated OEIC providing a range of risk-managed multi-asset funds and a specialised absolute return fund.

The Group has 15 offices across the UK and the Channel Islands including London, Birmingham, Cheltenham, East Anglia, Exeter, Hampshire, Leeds, Manchester, Nuneaton, Tunbridge Wells, Scotland, Wales, Jersey and Guernsey and Isle of Man.

We believe that by working together with professional advisers, we can help to provide the best outcomes for underlying clients. We work to build long-term relationships underpinned by trust, professionalism and shared values.

With over 30 years' experience of constructing and actively managing long-term portfolios, we believe in taking a durable approach. This ethos is a perfect fit with our belief that investing responsibly can generate long-term value for our clients.

The Responsible Investment Service is backed by an experienced team serving the growing demand for responsible investing. It is both integrated with our Centralised Investment Process and can call on the considerable resources of our firm's wider infrastructure and resources.

Why we wanted to sponsor the report

Our business is built on working closely with advisers to provide suitable investment solutions for their clients. Some of the consistent feedback we have received has been on the challenges advisers face when trying to evaluate responsible investment solutions. As a relatively new space within our industry there is still a lot of confusion and a lack of clarity over what to consider. We want to be active participants in helping advisers engage with responsible investment solutions, to identify the best proposition for their clients, and believe the [ESG Accord MPS](#) report provides a great resource.

ESG and Sustainability

We launched our [Responsible Investment Service](#) (RIS) in January 2019 which provides [two distinct strategies](#) for clients who want to incorporate non-financial objectives alongside their financial objectives.

'Advance' seeks to gain investment exposure to companies that are positively contributing to the strategies eight sustainability themes through the products and services they provide, and companies that are contributing through their operational management. Clients can access this strategy via both our [Managed Portfolio Service \(MPS\)](#) and [Bespoke Portfolio Service \(BPS\)](#).

'Avoid' is based on a formal exclusion policy on five product areas; armaments, tobacco, alcohol, gambling and pornography. Clients can access this strategy through our BPS.

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RIS provides multi-asset, risk managed investment portfolios that aim to meet a wide range of client financial objectives whilst upholding the non-financial objectives of Advance or Avoid. We have built a structured, robust process to our research, portfolio construction, monitoring and reporting and continue to invest in the evolution of the service.

In line with our commitments as signatories to the UN Principles for Responsible Investment (signed 2020) we have enhanced the way that we integrate ESG considerations into all of our research. ESG integration is the explicit and systematic inclusion of ESG issues into investment analysis and decision making to better manage risks and provide growth opportunities. We recognise that a broad range of financial and non-financial considerations may be relevant in making investment decisions. We look to identify and mitigate negative ESG factors that are, or could become, material to long-term financial performance.

We also understand the importance of reflecting these beliefs in how we manage our own business. Amongst other [initiatives](#) we have committed to becoming a net-zero carbon business operationally by 2030.

For more information on our investment and corporate approach to ESG and sustainability please visit the [responsible investment hub](#) on our website.

Important information

Investors could get back less than they invested. Past performance is not a reliable indicator of future results. Changes in exchange rates may have an adverse effect on the value of an investment. Changes in interest rates may also impact the value of fixed income investments. The value of your investment may be impacted if the issuers of underlying fixed income holdings default, or market perceptions of their credit risk change.

There are additional risks associated with investments in emerging or developing markets.

In our 'Avoid' strategy, while we aim to avoid investment in the industries referenced, we cannot guarantee total exclusion from the portfolio. The value of your investments and the income from them may go down as well as up and neither is guaranteed.

The information in this document does not constitute advice, nor a recommendation, and investment decisions should not be made on the basis of it. This document is for the information of the recipient only and should not be reproduced, copied nor made available to others.

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Further information relating to the Brooks Macdonald group of companies can be found at brooksmacdonald.com

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