

# SRI Services & Partners Good Money Week event

The sustainable investment event for Financial Advisers, Planners and Wealth Managers



## Event partners:



## Hosted by:



## Keynote & expert speakers:



## Part of:



## Supported by:



## CPD provider:



# Thank you for being part of it!



Whether you joined us on the day, as a delegate or partner, or simply registered to stay connected, **thank you** for supporting our sustainable, responsible and ethical investing.

Our annual **SRI Services & Partners Good Money Week** event was a huge success. Bringing together **leading voices in sustainable finance, inspiring discussions** and **hundreds of engaged professionals** from across the sector.

 **16<sup>th</sup>** Good Money Week

 **208** delegates

 **26** expert speakers

 **16** sustainable investment partners

## Let us know what you thought

Your input helps us shape the future of sustainable investment events and tools

Attended the event? | [Email funds@sriseservices.co.uk](mailto:funds@sriseservices.co.uk) to share feedback

Interested in Dialshifter®? | [Get involved here](#)



**COMING SOON**  
RECORDINGS ON  
'SRI SERVICES'  
CHANNEL





# Event agenda



**10:00 - 10:15 Welcome** – Julia Dreblow, *Founder & CEO* - SRI Services & Fund EcoMarket

**10:15 - 10:55 Fund Manager Panel: SDR labelling** – one year on

**10:55 - 11:25 Keynote Speaker** – Louisa Chender, *Technical Specialist, Sustainable Finance Policy* - FCA

11:25 - 11:45 *Coffee break*

**11:45 - 12:25 Fund Manager Panel: Geopolitics** and its impact on sustainable and responsible investment

**12:25 - 12:40 Guest Speaker** – Peter Uhlenbruch, *Financial Institutions Engagement Manager* - SBTi

**12:40 - 13:20 Fund Manager Panel: Climate transition explored** – how can investors help achieve net zero?

**13:20 - 13:40 Fund Manager Panel: Reasons to be cheerful** – part 1 – brief individual presentations on inspiring topics

13:40 - 14:50 *Lunch break*

**14:00 - 14:30 Portfolio Manager Lunchtime Panel** (upstairs)

**14:50 - 15:15 Welcome back** – ASG update

**15:15 - 15:40 Keynote Speaker** – Solitaire Townsend, Co-Founder and Chief Solutionist - Futerra

**15:40 - 16:10 Fund Manager Panel: Nature** – growing opportunities to make money and do good on land and in the oceans

**16:10 - 16:30 Good Money Week update** – James Alexander, CEO - UKSIF

**16:30 - 16:55 Fund Manager Panel: Reasons to be cheerful** – part 2 – brief individual presentations on inspiring topics

**16:55 - 17:15 Close / next steps**

**17:15 - 20:00 Drinks reception...** Reasons to be cheerful – part 3



# Welcome Address

**Julia Dreblow**

*Founder and CEO*

**SRI Services  
& Fund EcoMarket**



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VISIT





# Julia Dreblow

*Founder and CEO*

## **SRI Services & Fund EcoMarket**



Julia Dreblow founded SRI Services and the Fund EcoMarket database tool in 2010 to support advisers' understanding of sustainable, responsible and ethical investment options - and help advance the market. She is now Vice-Chair of the FCA's Advisers' Sustainability Group, which aims to report soon, and was appointed to FCA's Disclosure and Labels Advisory Group in 2021, to contribute to SDR. She was also the technical author of the BSI sustainable fund standard PAS 7342, that launched in March 2025.

Previously, she was a director of not-for-profit UKSIF for ten years and SRI manager at Friends Provident - having started her career as a broker consultant at NPI in 1989.

[www.FundEcoMarket.co.uk](http://www.FundEcoMarket.co.uk)



# In 2025 we...

**SDR / labelling  
policy**  
(c135 in use)

**Fund EcoMarket:**

Removed **104**  
Renamed **312**  
Added **33**



**BSI**

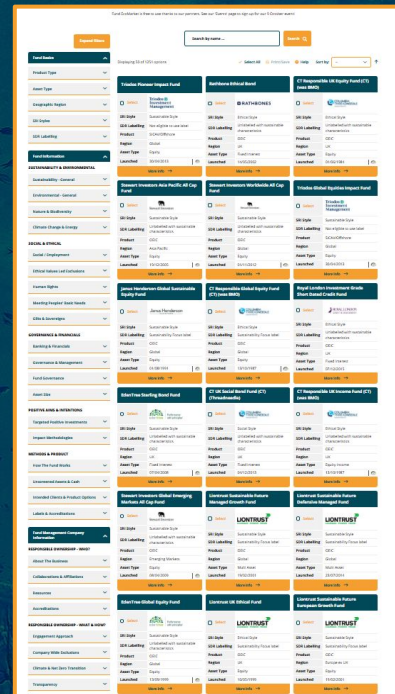
**PAS 7342**

Pub. March 25  
(Technical Author)

**ASG**

(Vice Chair - for FCA)  
Report

**Consult /  
support /  
socialise/ train**



**PAS 7342:2025**

Sustainable investment funds –  
Design, implementation, monitoring  
and communication of sustainability  
attributes – Specification



Department for  
Energy Security  
& Net Zero



## Our Partners

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**aeon**  
Asset Management

**Foresight**  
Invest Build Grow

**Janus Henderson**  
Investment Management

**M&G**  
Investments

**BNY** | INVESTMENTS

**oaktree**  
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**Vert**  
ASSET MANAGEMENT



sustainable  
Search term

ethical  
Search term

responsible  
Search term

esg  
Search term



United Kingdom ▼

09/01/2015 - 01/10/2025 ▼

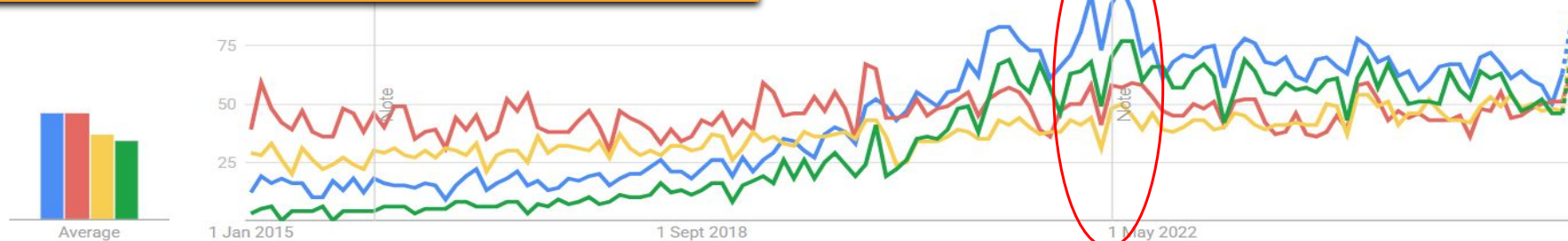
Finance ▼

Web Search ▼

Interest over time ?

What has happened to interest in sustainable investment since 2015?

**FCA FLS 24** '72% of adults who already had investments (or a DC scheme) want to do some good as well as provide a financial return'



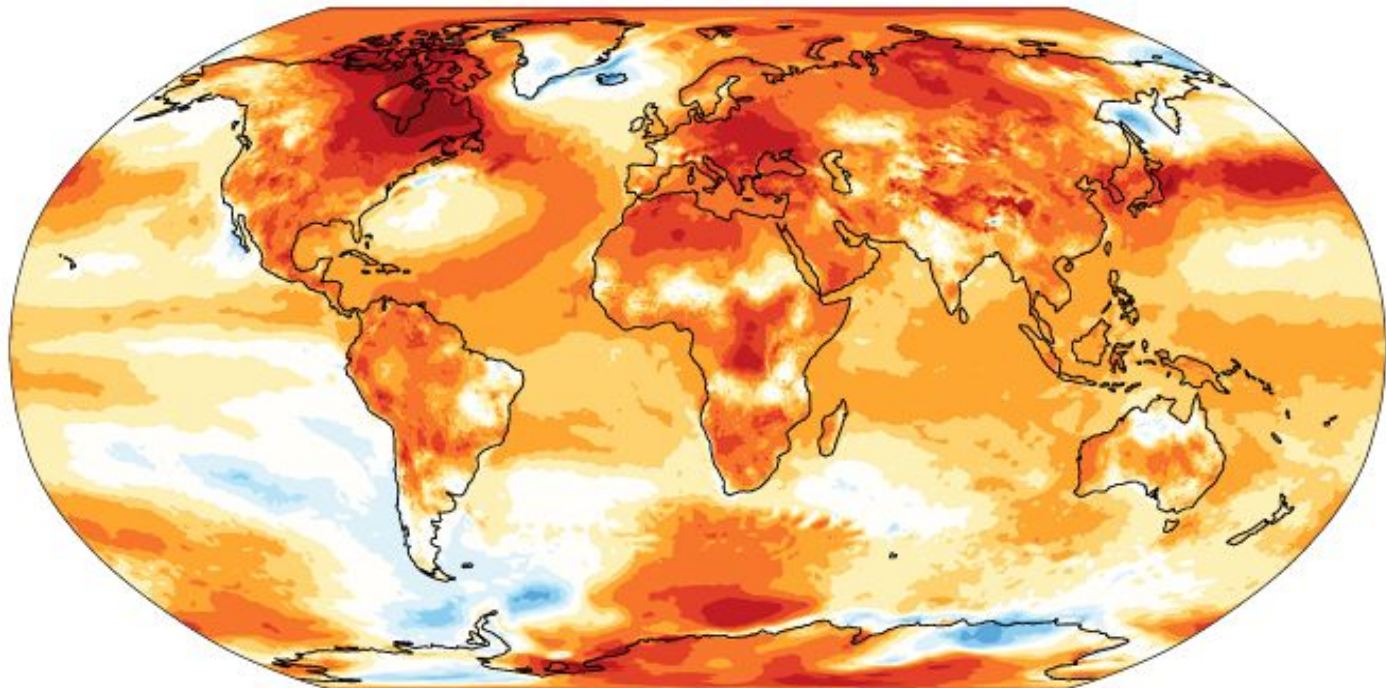


**Why are  
(many /  
most)  
businesses  
still taking  
climate  
change  
seriously?**

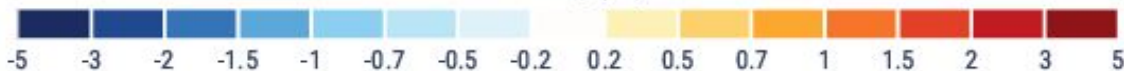


## Surface air temperature anomalies in 2024

Data: ERA5 • Reference period: 1991–2020 • Credit: C3S/ECMWF



Anomaly (°C)





# Context: Institute & Faculty of Actuaries & Exeter University - Planetary Solvency dashboard

“There is a risk that interacting biophysical and socioeconomic factors, lead to economic shocks and contraction of GDP.

Risk position **GREEN**

**Limited** economic impacts in 2024, although scale of climate events and subsequent losses continues to trend upwards.

Risk trajectory **AMBER**

Latest estimates of climate impacts now forecast **19% GDP** impact by 2050 , **Decimation or Catastrophic** level economic impacts now **Possible** due to high range of uncertainty impact of interconnected risk drivers”



VIEW RISK DASHBOARD

GLOBAL TIPPING POINTS



# What are people searching for?

## Fund EcoMarket

### Top 36 | 1/1/25 – 30/9/25



**Fund EcoMarket** for sustainable, ESG and ethical fund research

Fund EcoMarket is free to use thanks to our partners.

Search by fund name ...

Displaying 50 of 1318 options from Fund EcoMarket

**Fund Basics**

- SRI Style
- Asset Type
- Geographic Region
- Product Type
- SRI Labelling

**Fund Information**

**SUSTAINABILITY & ENVIRONMENTAL**

- Nature & Biodiversity
- Climate Change & Energy
- Environmental - General
- Sustainability - General

**SOCIAL & ETHICAL**

- Social / Employment
- Ethical Values List Exclusions
- Human Rights
- Meeting People's Basic Needs
- Gifts & Sponsorships

**Quilter Climate Assets Growth Fund**

SRI Style: Sustainable  
SDR Label: Working towards adopting label  
Product: OEC  
Region: Global  
Asset Type: Mixed Asset  
Launched: 21/09/2022

**Rothmans Active Income and Growth Fund**

SRI Style: Ethical  
SDR Label: Working towards adopting label  
Product: Charities  
Region: Global  
Asset Type: Mixed Asset  
Launched: 02/07/2012

**Liontrust Sustainable Future UK Growth Fund**

SRI Style: Sustainable  
SDR Label: Working towards adopting label  
Product: OEC  
Region: UK  
Asset Type: Equity  
Launched: 19/02/2001

**Stonext Investors Asia Pacific Sustainability Fund**

SRI Style: Sustainable  
SDR Label: Not applicable to this label  
Product: SICAV/Offshore  
Region: Asia Pacific  
Asset Type: Equity  
Launched: 28/02/2019

**Schroder Global Climate Real Income Fund**

SRI Style: Sustainability Tilt  
SDR Label: --  
Product: OEC  
Region: Global  
Asset Type: Equity  
Launched: 09/12/2008

**BNY Mellon FutureLegacy 3 Fund**

SRI Style: Unclassified  
SDR Label: Working towards adopting label  
Product: OEC  
Region: Global  
Asset Type: Mixed Asset  
Launched: 02/03/2021

**EdenTree Responsible & Sustainable Multi Asset Balanced Fund**

SRI Style: Sustainable  
SDR Label: --  
Product: Sustainable  
Region: --  
Asset Type: --  
Launched: --

**Liontrust Sustainable Future Managed Fund**

SRI Style: Sustainable  
SDR Label: --  
Product: Sustainable  
Region: --  
Asset Type: --  
Launched: --

**M&G Sustainable Multi Asset Growth Fund**

SRI Style: Sustainability Tilt  
SDR Label: --  
Product: Sustainable  
Region: --  
Asset Type: --  
Launched: --

#### Filter Name

Sustainability Focus label

Sustainability Impact label

OEIC

Sustainability Improvers label

Equity

Sustainability Mixed Goals label

Sustainable Style

Global

Working towards adopting label

SICAV/Offshore

Multi Asset

Environmental Style

Unlabelled with sustainable characteristics

Ethical Style

Armaments manufacturers avoided

UK

Investment Trust

Coal, oil & / or gas majors excluded

#### Filter Name

Mixed Asset

Passive Equity

Sustainability Tilt

Other

Tobacco and related product manufacturers excluded

Equity Income

Fixed Interest

DFM/Portfolio

ESG Plus

ETF

Social Style

Sustainability policy

Faith Based

Gambling avoidance policy

Pension

Environmental policy

Climate change / greenhouse gas emissions policy

Animal welfare policy



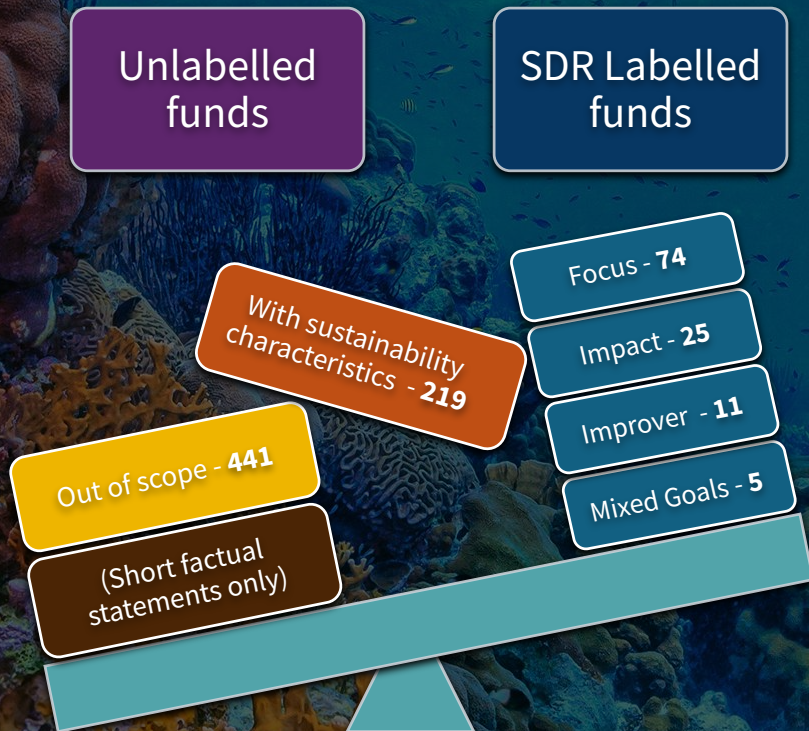
# What is SDR?

Principles based disclosure regime to:

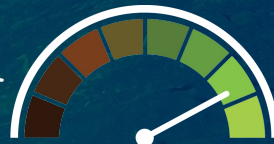
- Build client trust – (disclosure & anti greenwash)
- To help clients find funds – labels
- Standard info ‘along the chain’ (market integrity)
- ... new / imperfect

**I H 2025 source:**  
**Fund EcoMarket**

- 285 funds renamed
- 95 funds closed



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fundEcoMarket  
by SRI SERVICES

## SDR Labelling

- ☐ Sustainability Focus label (74)
- ☐ Sustainability Impact label (25)
- ☐ Sustainability Improvers label (11)
- ☐ Sustainability Mixed Goals label (5)
- ☐ Unlabelled with sustainable characteristics (197)
- ☐ Working towards adopting label (6)
- ☐ Not eligible to use label (412)
- ☐ Other (3)



# Fund Manager Panel: SDR labelling – one year on



**Miranda Beacham**  
*Head of UK Responsible  
Investment*  
**Aegon Asset  
Management**



**David Harrison**  
*Head of  
Sustainability*  
**Rathbones Asset  
Management**



**Jenn-Hui Tan**  
*Chief  
Sustainability Officer*  
**Fidelity International**



# Miranda Beacham

*Head of UK Responsible Investment*

**Aegon Asset Management**



Miranda Beacham is head of UK responsible investment. Her role involves overseeing the environmental, social and governance research process for ethical and sustainable funds as well as overseeing the stewardship activities, supporting the ESG integration processes and further research in ESG issues for investments across Aegon AM UK. She leads engagement activities with public policy makers and investee companies on issues such as board structure, remuneration, environmental impact and social practice. She sits on the stewardship committee and chairs the remuneration and share schemes committees at the Investment Association in the UK. Miranda co-founded the UK responsible investment team in 2000. Miranda joined the industry and the firm in 1995.



# David Harrison

*Head of Sustainability*

## **Rathbones Asset Management**

David is the head of sustainability and lead fund manager of the Rathbone Greenbank Global Sustainability Fund at Rathbones Asset Management. David joined Rathbones in June 2014 after 14 years working in equity analysis and fund management, including time at Hermes and Goldman Sachs. David is a Chartered Financial Analyst (CFA) charterholder and holds the Investment Management Certificate. He graduated with a BSc (Hons) in Economics and Politics from the University of Southampton.





# Jenn-Hui Tan

*Chief Sustainability Officer*

**Fidelity International**

Jenn-Hui Tan is Chief Sustainability Officer for Fidelity International. Jenn is responsible for providing external and internal leadership for Fidelity's sustainable investing activities, including the strategy and policies on engagement, voting and ESG integration. Jenn joined Fidelity International in 2007 from Norton Rose Fulbright, where he was a corporate finance lawyer advising on capital market and M and A transactions. He holds an LLB Law degree from the University of Durham.





# Keynote Speaker

## Louise Chender

*Technical Specialist,  
Sustainable Finance Policy*

**Financial Conduct  
Authority**





# Louise Chender

*Technical Specialist, Sustainable Finance Policy*

## **Financial Conduct Authority**



Louisa is a Technical Specialist in Sustainable Finance Policy at the FCA, leading on sustainability disclosure and transition finance initiatives. She led the introduction of the FCA's first climate-related disclosure rules for asset managers and asset owners, and more recently, the introduction of Sustainability Disclosure Requirements and labelling regime. She also represents the FCA in international fora, particularly IOSCO's Sustainable Finance Taskforce, focusing on global corporate reporting, assurance and ethics standards. Previously, she worked in cross-cutting policy, regulatory intelligence across financial services and as journalist covering derivatives markets.



# Coming up next



11:25 - 11:45 *Coffee break*

**11:50 - 12:30 Fund Manager Panel: Geopolitics** and its impact on sustainable and responsible investment

- George Crowdy - Royal London Asset Management
- Siân Jones - Sarasin & Partners
- Adam Robbins - Triodos Investment Management

**12:30 - 12:45 Guest Speaker** – Peter Uhlenbruch, *Financial Institutions Engagement Manager* - SBTi

**12:45 - 13:25 Fund Manager Panel: Climate transition explored** – how can investors help achieve net zero?

- Jorg Soens - BNY Investments
- James Corah - CCLA Investment Management
- Samuel Adams - Vert Asset Management

**13:25 - 13:40 Fund Manager Panel:**

**Reasons to be cheerful** – part 1 – brief individual presentations on inspiring topics

- Caroline Langley - Quilter Cheviot Investment Management
- Robert Lambert - RBC BlueBay Asset Management

13:40 - 14:50 *Lunch break*

**14:00 - 14:30 Portfolio Manager Lunchtime Panel** (upstairs)

- Natalie Kenway - Chair
- Rowan Stone - atomos/Virtuvest
- Mollie Thornton - Parmenion
- Alex Funk - PortfolioMetrix
- Gemma Woodward - Quilter Cheviot



# Fund Manager Panel: Geopolitics and its impact on sustainable and responsible investment



 **ROYAL LONDON**  
ASSET MANAGEMENT

**George Crowdy**

*Senior Fund  
Manager*

**Royal London Asset  
Management**



**SARASIN**  
& PARTNERS

**Siân Jones**

*Stewardship  
Analyst*

**Sarasin & Partners**



**Triodos**   
Investment  
Management

**Adam Robbins**

*Head of Business  
Development*

**Triodos Investment  
Management**



# George Crowdy

*Senior Fund Manager*

## **Royal London Asset Management**



George joined Royal London Asset Management in February 2020 as a Fund Manager on the Sustainable Investment Team and is co-managing the Global Sustainable Equity and Sustainable Growth Funds and Sustainable Leaders, World and Diversified trusts alongside Mike, Sebastien and Daphne. Prior to this, George worked as an Investment Manager on the Global Sustainable Equity Team at Janus Henderson having joined Janus Henderson in 2010 as a graduate. George is a CFA Charterholder and has a BSc Economics and Finance from the University of Southampton.



# Siân Jones

*Stewardship Analyst*

**Sarasin & Partners**

Siân Jones is a Stewardship Analyst at Sarasin & Partners, driving social value chain engagement with investee companies with a focus on human and labour rights. Her previous role was leading social risk research and engagements at the FAIRR Initiative, where she focused labour risk in meatpacking. She holds an MA in Human Rights from University College London.



**SARASIN**  
& PARTNERS



# Adam Robbins

*Head of Business Development*

## Triodos Investment Management



With over 20 years' experience in senior distribution and key account management roles, Adam took the decision to join an organisation that focussed on having a positive impact that enabled him to align his career with his personal values. Having joined Triodos IM almost 7 years ago Adam now heads the pan European sales team and is responsible for the distribution of both public and private strategies into the UK market across all channels, and therefore works closely with the portfolio managers and analysts.

Outside of work Adam enjoys spending time with his wife and daughter walking the countryside and exploring new cities both in the UK and abroad and tries to find time to cycle, run and play tennis.



# Guest Speaker

## Peter Uhlenbruch

*Financial Institutions  
Engagement Manager*

**SBTi**





# Peter Uhlenbruch

*Financial Institutions Engagement Manager*

**SBTi**

Peter Uhlenbruch is Financial Institutions Engagement Manager at the Science Based Targets Initiative (SBTi), where he currently leads engagement with asset owners and asset managers globally. He was previously Director of Financial Sector Standards at the UK Responsible Investment charity, ShareAction, and has held a range of ESG-related research roles at CDP, MSCI, and Ownership Matters.





# Good Money Week 2025 SBTi presentation

PETER UHLENBRUCH

Financial Institutions Engagement Manager

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# INTRODUCTION TO THE SCIENCE BASED TARGETS INITIATIVE



# ABOUT THE SBTi

The Science Based Targets initiative (SBTi) is a **corporate climate action organization** enabling businesses worldwide to play their part in combating the climate crisis.

We **develop standards, tools and guidance** which allow companies and financial institutions to set voluntary GHG emissions reductions targets in line with what is needed to keep global heating below catastrophic levels and reach net-zero by 2050 at latest.

The SBTi is **incorporated as a charity**, with a subsidiary that hosts our target validation services. The subsidiary SBTi Services Ltd. assesses and **validates targets** submitted by companies, financial institutions, and SMEs.

Our partners are CDP, the United Nations Global Compact, the We Mean Business Coalition, the World Resources Institute (WRI), and the World Wide Fund for Nature (WWF).

## PARTNERS



United Nations  
Global Compact

WE MEAN  
BUSINESS  
COALITION



WORLD  
RESOURCES  
INSTITUTE







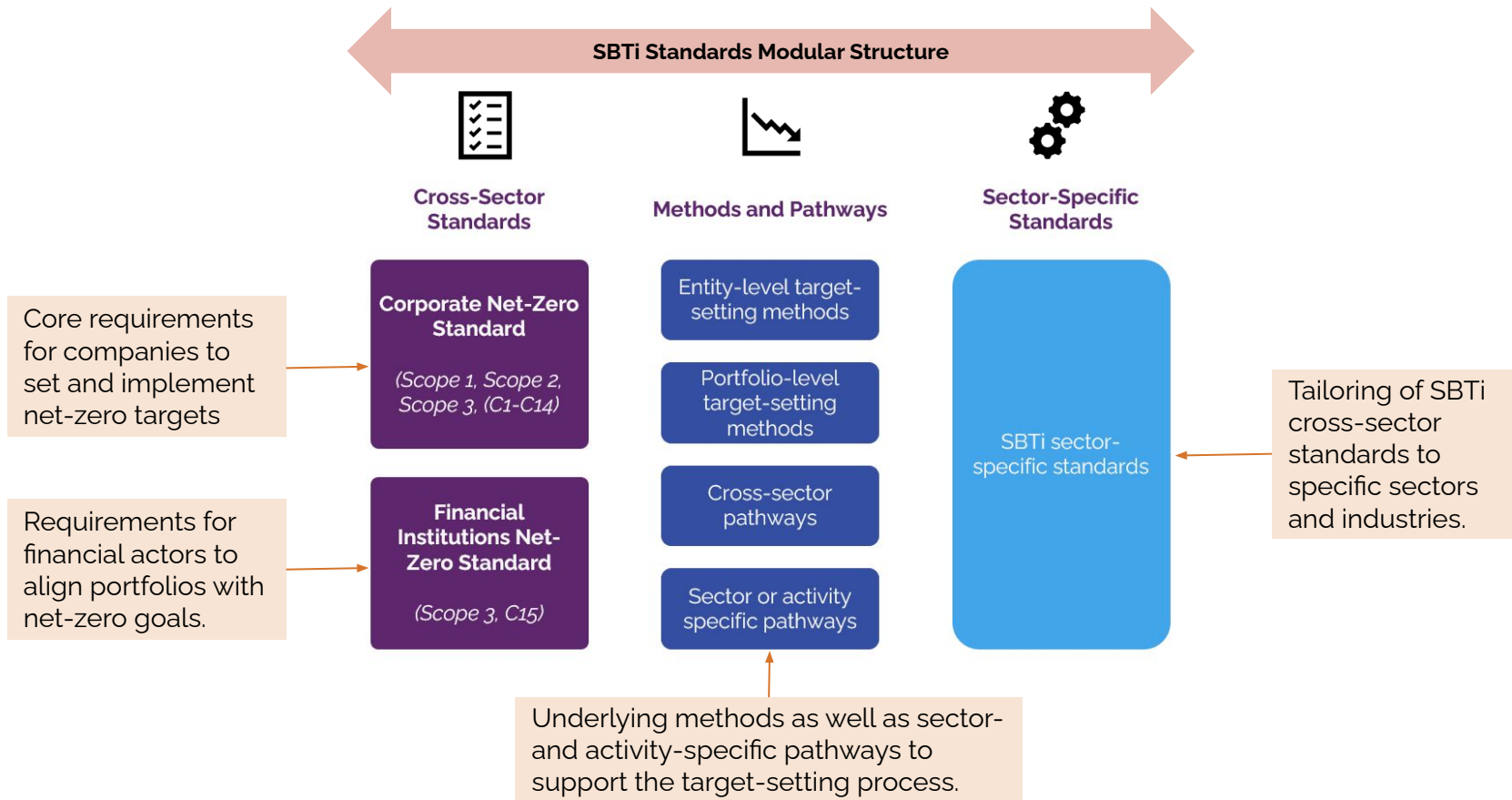
# OUR IMPACT

10 years of the SBTi





# SBTi develops and evolves standards, now within a modular structure





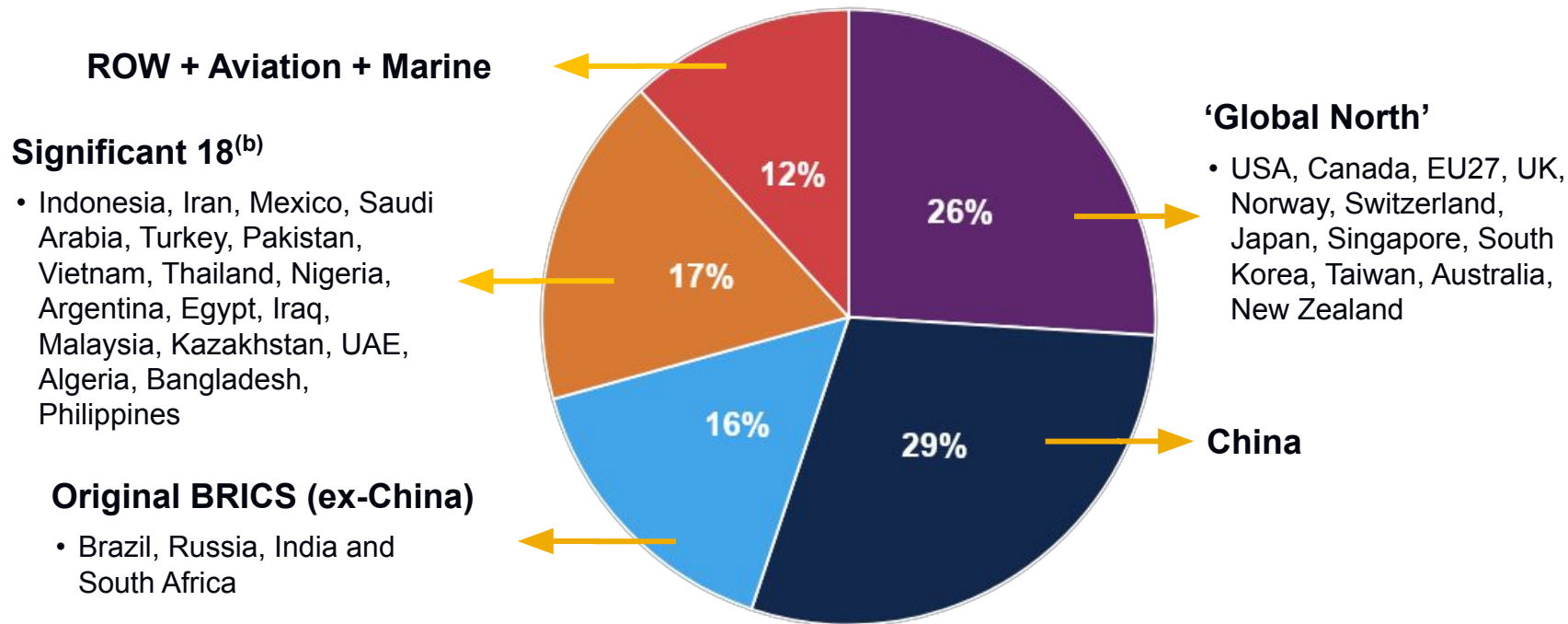


# INSIGHTS & RECENT TRENDS



# 62% of global emissions remain concentrated in 23 key emerging markets

Share of global GHG emissions, 2022<sup>(a)(1)</sup>



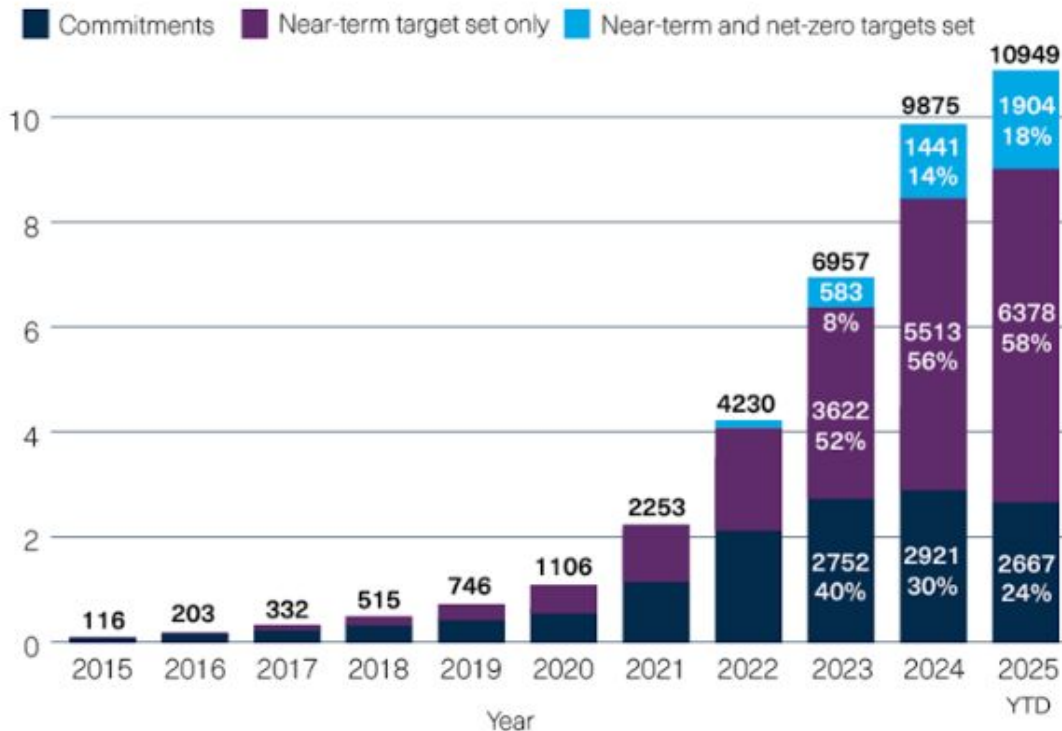
Notes: (a) Share of CO<sub>2</sub> equivalent from CO<sub>2</sub>, CH<sub>4</sub>, N<sub>2</sub>O and F-gases

(b) Each of Significant 18 countries account for greater than 0.5% of global emissions. Together these emitted 260% more than EU's total share of 6.7%

Source: (1) EU's Edgar Database v8.0, released on 26 October 2023



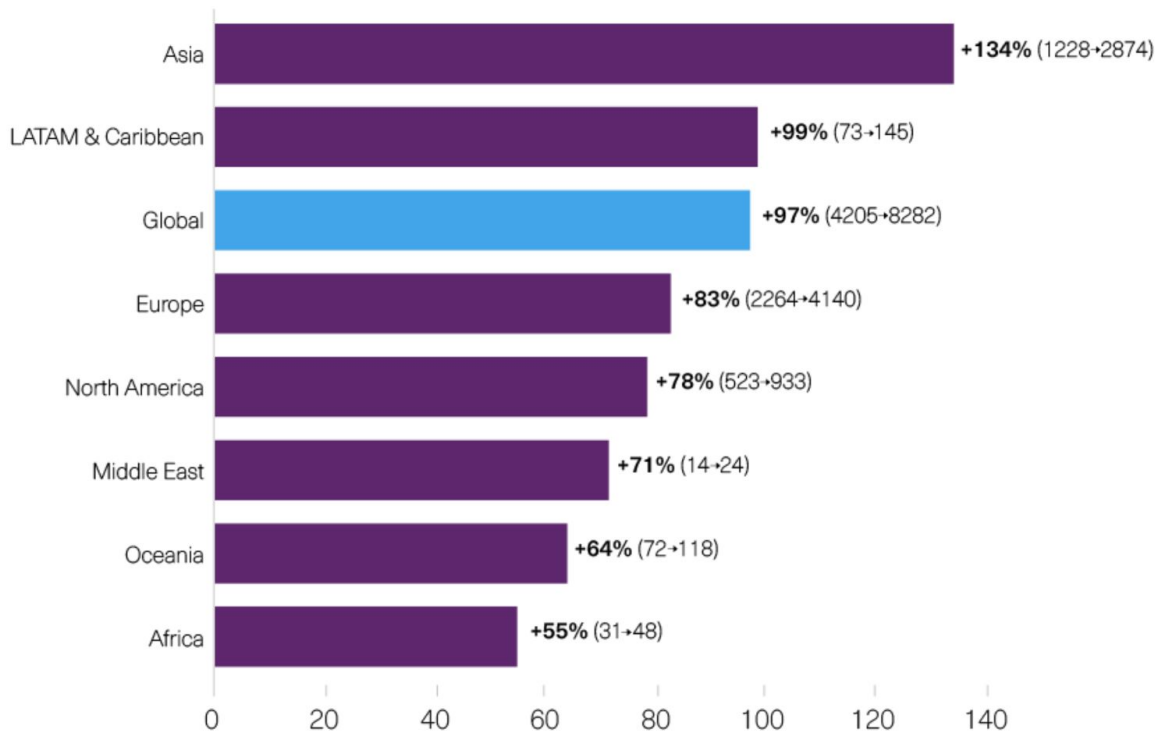
# Trend tracker (August) highlights - SBTi continues to grow



Source: [SBTi's Trend Tracker](#), August 2025



# Asia is driving global growth



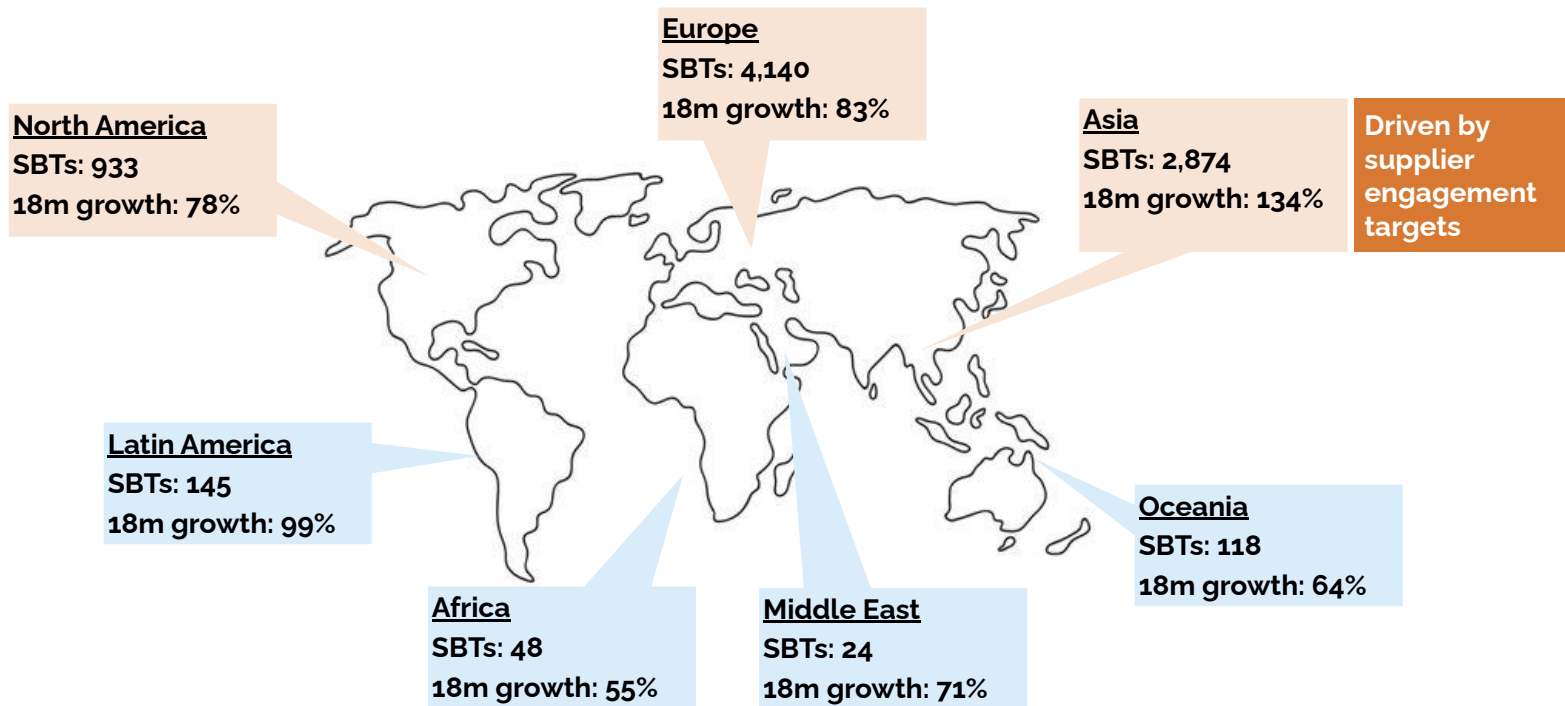
Note: Absolute change in the number of companies with validated targets is show in brackets

Source: [SBTi's Trend Tracker](#), August 2025



# While Europe has the most SBTi-validated companies and FIs, Asia is the fastest growing region in terms of target setting

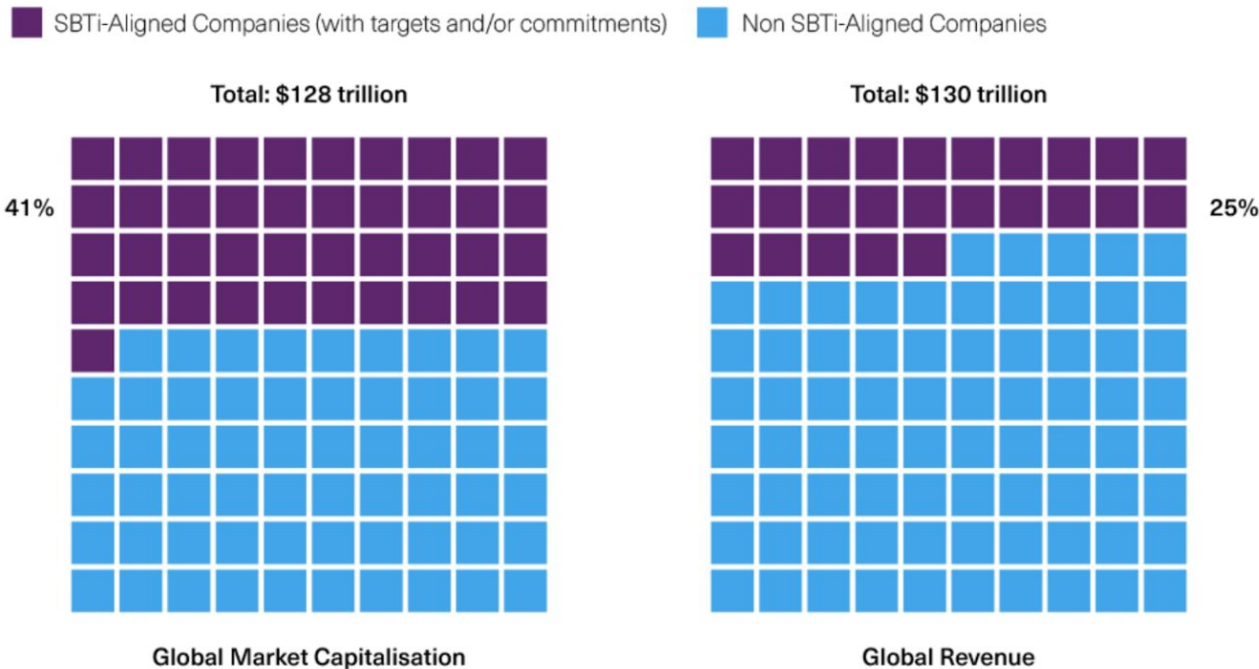
Validated SBTi target (end-Q2 2025) and growth in validations (end-2023 to end Q2-2025) <sup>(1)</sup>



Source: (1) SBTi, [Target Dashboard](#), end of June 2025  
(2) [SBTi Trend Tracker](#), August 2025

# 41% of global market cap now covered by SBTs

## Revenue and market capitalization of listed global companies as at the end of 2024, US\$tn





# Setting and delivering science-based climate targets make commercial sense

1

**Better energy efficiency and lower energy related costs increase profitability**



2

**Reduced carbon intensity improves competitiveness when selling to international businesses with scope 3 climate targets**



3

**Science-based climate targets increase business resilience, prepares for incoming regulation and reduces transition risks**



4

**SBTi targets increase investor confidence in long-term business model sustainability, and proactive management of climate-related risks**



5

**Low-carbon transition plans drive innovation and foster ecosystem collaboration**



# Financial institutions are factoring climate credibility into their valuations and lending rates



Journal of Climate Finance

Volume 10, March 2025, 100057



## Generating shareholder value through the announcement of sustainability-linked bond issuance

Jannis Poggensee <sup>a</sup> 



### Working Paper Series

Carlo Altavilla, Miguel Boucinha,  
Marco Pagano, Andrea Polo

Climate risk, bank lending and  
monetary policy



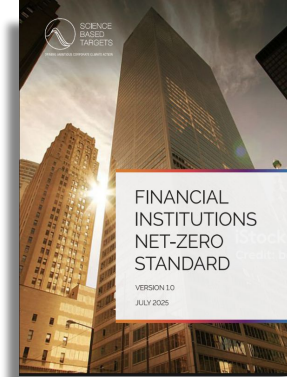
# FINANCIAL INSTITUTIONS NET-ZERO STANDARD

# Financial institutions now have two options for target setting, with the net-zero standard recommended going forward



## Financial Institutions Near-Term Criteria (FINT)

- **Near-term targets only**
- Launched 2020 and updated in May 2024
- 170+ validated FIs globally

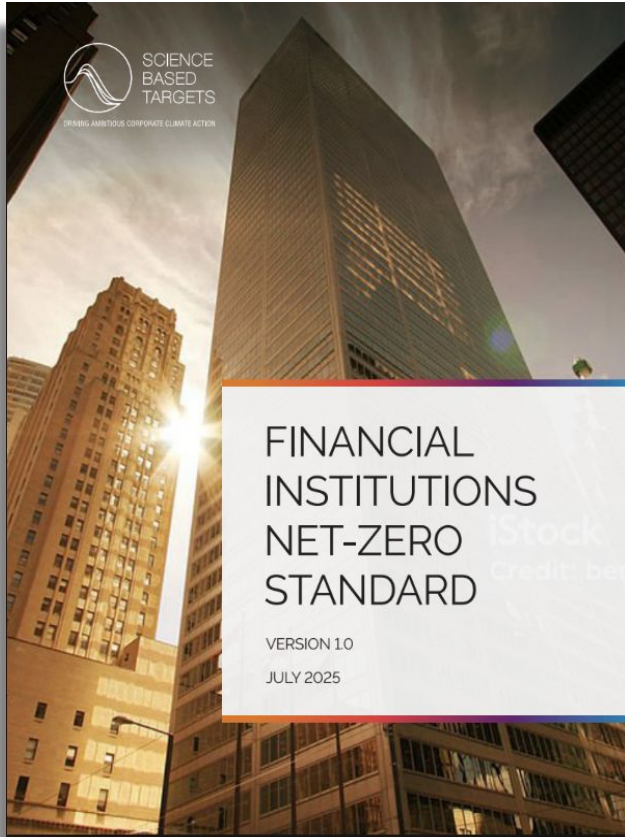


## Financial Institutions Net-Zero Standard (FINZ)

- **Near term and long-term targets**
- **Launched in July 2025**
- **130+ committed FIs**



# Financial Institutions Net-Zero Standard (FINZ) was launched in July 2025

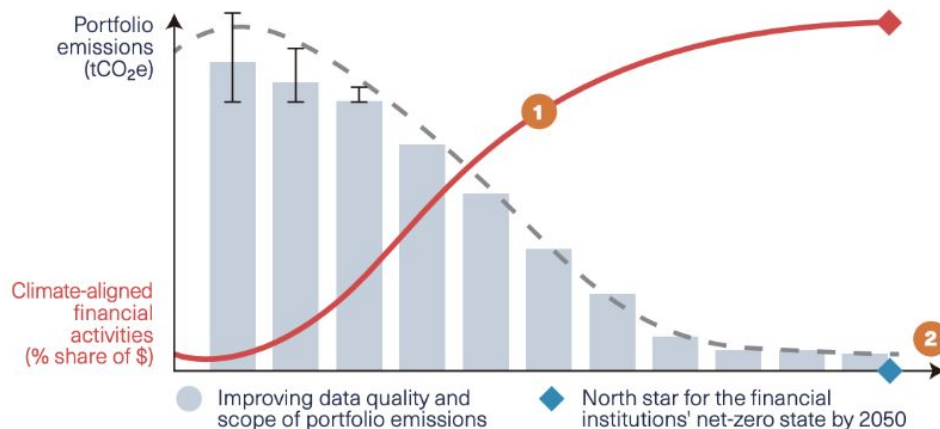


## It was shaped by:

- Two public consultations
- Pilot testing with FIs
- Input from an Expert Advisory Group (EAG)
- Sign-off by independent Technical Council
- Adopted by Board

# The FINZ Standard focuses on portfolio alignment over emissions

## CONCEPTUAL FRAMEWORK



### 1 Portfolio climate alignment

Leading metric to increase the share of financial activities supporting climate solutions and counterparties that are in transition or at a net-zero state.

### 2 Portfolio emissions

Lagging metric to reduce aggregate portfolio GHG emissions to zero or near-zero levels by 2050 and ensure that any residual emissions are neutralized by individual counterparties.

## SCOPE AND TARGET AUDIENCE

The Standard is a voluntary, cross-sector standard for financial institutions covering:

Lending

Asset Ownership

Asset Management

Insurance Underwriting

Capital Markets



# The FINZ Standard provides a structured target setting framework

Financial institutions' net-zero transformation journey entails:



Any net-zero claims made by financial institutions must be accurate, transparent, verifiable, and compatible with the criteria in the Standard.

## Increased scope and data quality over time



GHG inventory, including for key emissions-intensive sectors



Share of clean energy-to- fossil fuel financial exposure



Climate alignment of entities/ projects/assets



Deforestation exposure assessment by 2030

## POLICIES AND TARGET-SETTING

### Immediate action combined with near- and long-term targets



Public **fossil fuel transition policy** of:

- No new financing or insuring of coal expansion.
- No new project financing or insuring of oil and gas expansion.
- No new general-purpose financing or insuring of companies involved in oil and gas expansion immediately or by 2030 at the latest.



Public **no-deforestation plan** by target renewal if significant exposure.



Public **real estate policy recommendation** of:

- No new financing to new non-zero-carbon-ready buildings.
- Increased financing for retrofitting existing buildings.



**Near-term targets** with flexibility to select between:

- **Portfolio climate-alignment targets** that include the use of eligible third-party climate-alignment methodologies, or
- **Sector targets** that align the financing of key emissions-intensive sectors with emissions or technology share benchmarks, including required coal phase-out targets.



**Long-term targets** to align at least 95% of financing with net-zero benchmarks by 2050 at the latest.

# FINZ Standard unlocks interoperability via implementation list



## FINANCIAL INSTITUTIONS NET-ZERO STANDARD PROVISIONAL IMPLEMENTATION LIST

Version 1.0

July 2025

### Eligible 3rd Party alignment methodologies

- At entity, SME & asset/project level
- Range of commercial & non-commercial methodologies

### Climate solutions

- Defined where 90% revenue are in activities featured across eligible taxonomies (global, regional & national).




peteruhlenbruch@sciencebasedtargets.org

# Thank you for listening!

Science Based Targets Initiative is a registered charity in England and Wales (1205768) and a limited company registered in England and Wales (14960097). Registered address: First Floor, 10 Queen Street Place, London, England, EC4R 1BE.


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SBTI Services Limited is a wholly owned subsidiary of Science Based Targets Initiative.

 [sciencebasedtargets.org](https://sciencebasedtargets.org)

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 [Science Based Targets](https://www.youtube.com/ScienceBasedTargets)

 [/science-based-targets](https://www.linkedin.com/company/science-based-targets)

 [info@sciencebasedtargets.org](mailto:info@sciencebasedtargets.org)

# Fund Manager Panel: Climate transition explored – how can investors help achieve net zero?



BNY | INVESTMENTS

**Jorg Soens**

*Responsible Investment -  
Senior Specialist*

**BNY Investments**



**CCLA**  
GOOD INVESTMENT

**James Corah**

*Head of  
Sustainability*

**CCLA Investment  
Management**



**Vert**  
ASSET MANAGEMENT

**Samuel Adams**

*CEO and  
Co-Founder*

**Vert Asset  
Management**



# Jorg Soens

*Responsible Investment - Senior Specialist*

**BNY Investments**



Jorg joined the Responsible Investment Team within the Fixed Income Group in March 2023, responsible for supporting the growth and development of responsible investment products and solutions at Insight. Jorg joined from Mercer, where he spent over five years as a Lead Investment Solutions Specialist and Currency Manager. Before this, he was a Portfolio Manager with KBC Fund Management. Jorg holds a Masters in Finance & Risk from University College Ghent, a Masters in MIS from University Hasselt and a Masters in General Management from Vlerick Business School. He is a CFA charterholder and holds the CFA Institute Certificate in ESG Investing.



# James Corah

*Head of Sustainability*

## CCLA Investment Management



James is responsible for CCLA's approach to sustainable investing. This includes our work to deliver real and lasting change through active stewardship, integrating environmental, social, and governance factors into our investment processes and ensuring that our portfolios are aligned with the values and mission of our clients.

James joined CCLA in 2010 and has developed and led programmes that have improved corporate behaviour on a wide range of issues including climate change, mental health, the Living Wage and modern slavery.

James was most recently recognised by the Investment Week's Sustainable Investment Awards 2023 for his Outstanding Contribution to the Sustainable Investment Industry. He was also named one of Financial News' 40 Rising Stars of Asset Management in Europe, 2020.

Prior to joining CCLA, James completed his PhD in economic geography at the University of Nottingham.



# Samuel Adams

*CEO and Co-Founder*

## **Vert Asset Management**



Sam is CEO and co-founder of Vert Asset Management. He chairs the Investment Research Group and is Portfolio Manager of the Vert Global Sustainable Real Estate Strategy. Sam has been a featured speaker on sustainable investing at financial advisor conferences in the US, UK, Europe, and Australia.

Sam is the author, with Larry Swedroe, of Your Essential Guide to Sustainable Investing. He is a member of the Plan Sponsor Council of America's Investment Committee.

Prior to launching Vert, Sam spent 20 years at Dimensional Fund Advisors where he led the European Advisor business and launched the Global Sustainability Core Fund.

Sam has a BA in Philosophy from the University of Colorado, Boulder and an MBA in Finance from the University of California, Davis.



# Fund Manager Panel: Reasons to be cheerful – part 1



  
QUILTER CHEVIOT

**Caroline Langley**

*Investment Director*

**Quilter Cheviot Investment  
Management**



RBC BlueBay  
Asset Management

**Robert Lambert**

*Portfolio Manager, Investment Grade*

**RBC BlueBay Asset Management**



# Caroline Langley

*Investment Director*

## **Quilter Cheviot Investment Management**



Caroline has nearly 20 years investment experience, most of which were gained at Quilter Cheviot where she has worked since 2006. She is the Deputy Fund Manager for the award-winning Sustainable Opportunities Funds (formerly known as the Climate Assets Funds). She also manages private client portfolios, working with clients directly or alongside advisers. Her investment qualifications and experience have led her to be a Fellow of the Chartered Institute for Securities & Investment (CISI). As a Chartered Accountant (FCA) Caroline is also a Fellow of the ICAEW. She read Human Sciences at St. Hilda's College, Oxford University graduating with a 2.1 before starting her accountancy training at PricewaterhouseCoopers. She also gained a Master's degree (distinction) in Environmental Technology from Imperial College specialising in Global Environmental Change and Policy.



# Robert Lambert

*Portfolio Manager, Investment Grade*

## **RBC BlueBay Asset Management**

Robert is a portfolio manager on the BlueBay Fixed Income Team, focussing on Investment Grade, particularly the utilities and TMT sectors. He joined the firm as a senior corporate analyst in 2008 from Credit Suisse where he was a director of investment grade research, covering European investment grade telecom, media, technology, and autos sectors. He was ranked fourth in Institutional Investor Magazine for his coverage of European TMT in 2008. Prior to his role at Credit Suisse, Robert was a derivatives analyst at Citigroup and an investment trust accountant at RBS Trust Bank. He started his career in the investment industry in 1997.



RBC BlueBay  
Asset Management







RBC BlueBay  
Asset Management

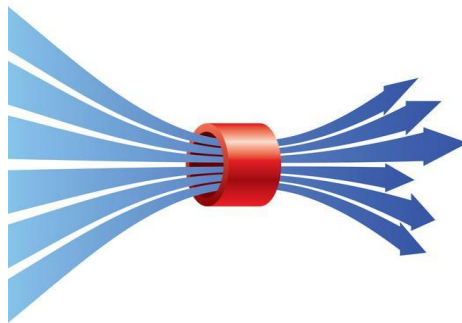
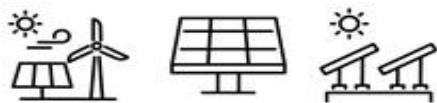
# Reasons to be cheerful

Advances in Transmission & Connecting Renewables

Robert Lambert, Portfolio Manager, RBC BlueBay Asset Management Impact-Aligned Fund

# The Challenge

- Renewables are growing faster than ever
- Transmission is the bottleneck
- Long interconnection queues = delayed projects



*“Projects waiting in queues – up to 2030s in some markets”*

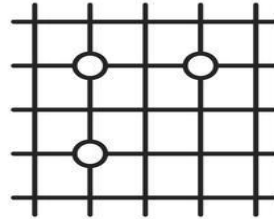


# Reason 1: Technology Leaps

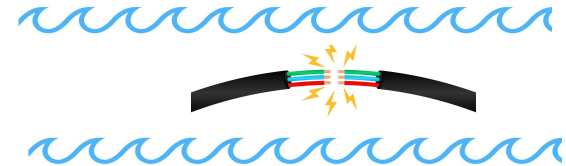
- HDVC enables long-distance, low-loss transmission
- Smart grids balance millions of distributed resources
- Subsea interconnectors open cross-border trade



*Low-loss*



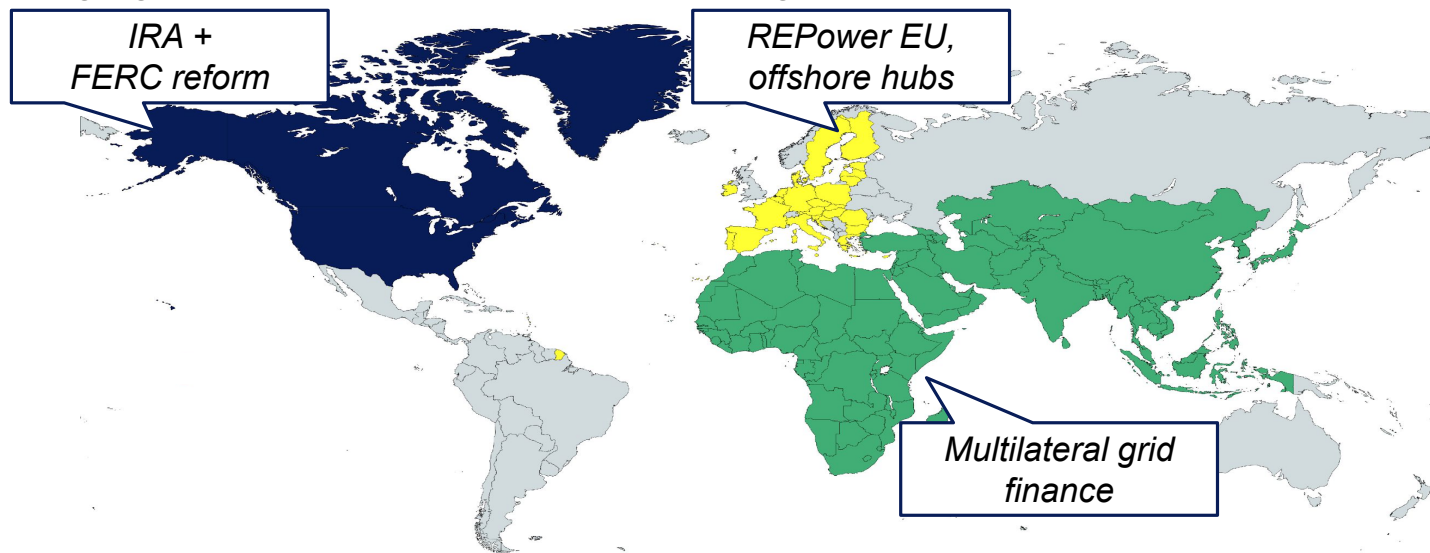
*Flexible*



*Cross-Border*

## Reason 2: Policy Momentum

- US: IRA + FERC reforms for interregional lines
- EU: REPowerEU + offshore hubs in the North Sea
- Emerging markets: multilateral support for grids



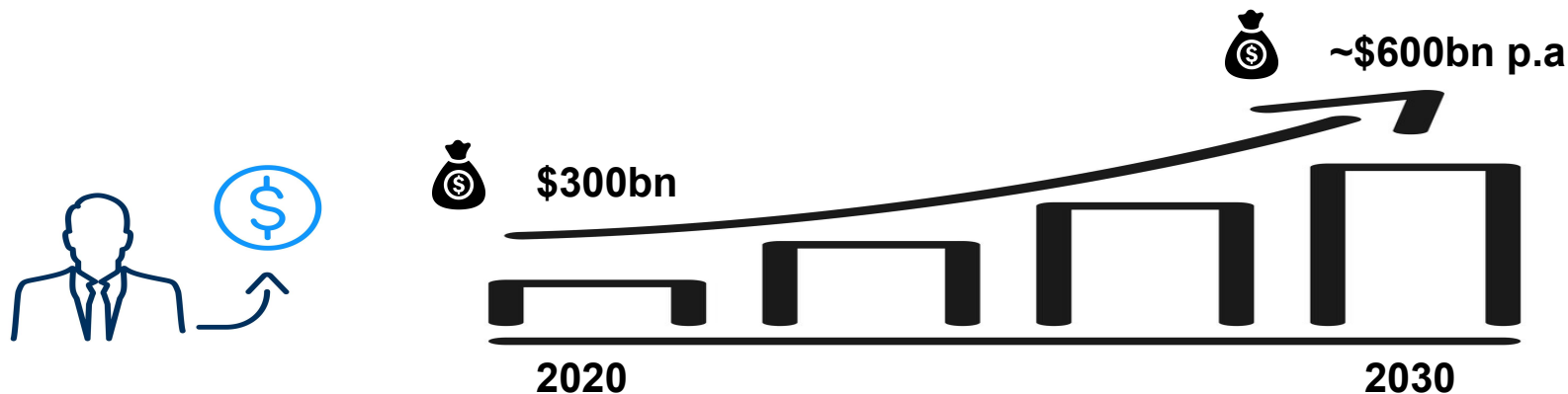
Source: RBC Global Asset Management, as at 1 October 2025  
Images: [www.gettyimages.co.uk](http://www.gettyimages.co.uk)



## Reason 3: Capital Flows

- Grid investment to double to >\$600bn annually by 2030
- Transmission = new asset class for infrastructure investors
- Innovative financing models (RAB, blended finance, merchant lines)

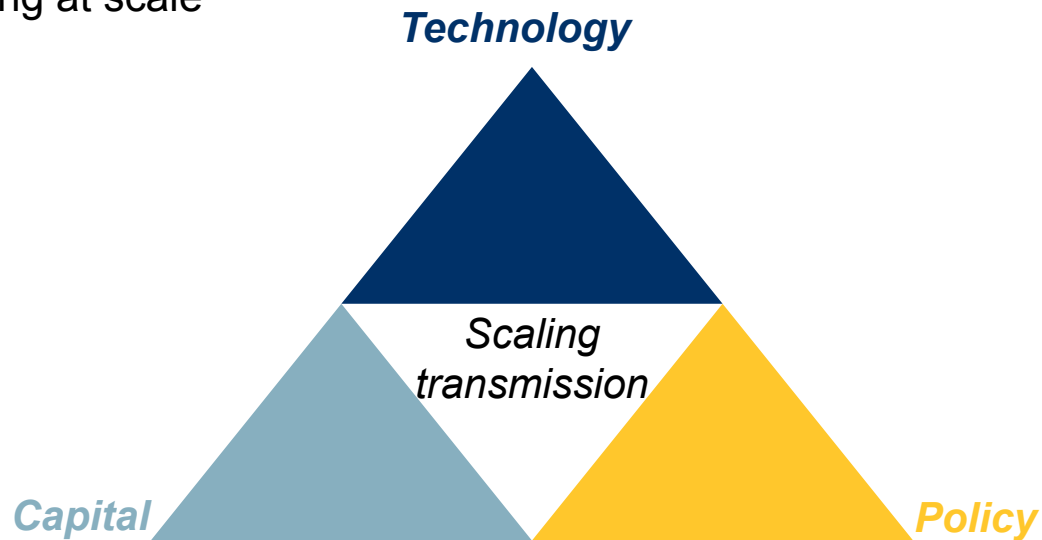
**Annual global grid investment doubling from 2020 to 2030**



*Transmission emerging as an asset class*

# Putting it together

- Technology is solving physics
- Policy is clearing barriers
- Capital is mobilising at scale



Source: RBC Global Asset Management, as at 1 October 2025  
Images: [www.gettyimages.co.uk](http://www.gettyimages.co.uk)

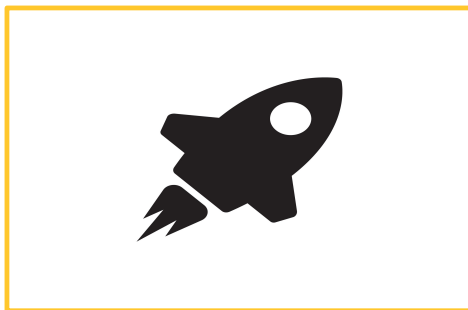


# Investor implications

- Long-duration, inflation-linked assets
- Growth: grids must expand 2x by 2030
- Adjacent opportunities in storage, digital optimisation



**Bond-like stability**  
“Inflation-linked, long duration”



**Growth**  
“2x grid expansion by 2030”



**Battery/storage**  
“Optionality in flexibility”

## Closing Thought

- Transmission is no longer a cost centre
- It's a profit pool and an enabler of net zero
- Real reasons to be cheerful!



***Transmission = Profit Pool + Net Zero Enabler***



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# Coming up next



13:40 - 14:50 Lunch break

## **14:00 - 14:30: Portfolio Manager Lunchtime Panel** (upstairs)

- Natalie Kenway - Chair
- Rowan Stone - atomos/ Virtuvest
- Mollie Thornton - Parmenion
- Alex Funk - PortfolioMetrix
- Gemma Woodward - Quilter Cheviot

**14:50 - 15:15 Welcome back** – ASG update

**15:15 - 15:40 Keynote Speaker** – Solitaire Townsend,  
Co-Founder and Chief Solutionist - Futerra

**15:40 - 16:10 Fund Manager Panel: Nature** – growing  
opportunities to make money and do good on land and in  
the oceans

- Charlie Anniss – M&G Investments
- Yi Shi – Pictet Asset Management

**16:10 - 16:30** Good Money Week update – James Alexander,  
CEO - UKSIF

**16:30 - 16:55 Fund Manager Panel:** Reasons to be cheerful –  
part 2 – brief individual presentations on inspiring topics

- Eloise Robinson - Columbia Threadneedle  
Investments
- Seb Beloe: Managing Director - Foresight
- Mike Appleby - Liontrust Asset Management

**16:55 - 17:15 Close and next steps**

**17:15 - 20:00 Drinks reception...** Reasons to be cheerful –  
part 3



Lunch break 13:40 - 14:50

# Portfolio Manager Lunchtime Panel



**Natalie Kenway**

*Freelance  
Journalist*

**Chair**



**Rowan Stone**

*Investment  
Director/ Partner*

**atomos/ Virtuvest**



**Mollie Thornton**

*Senior Investment  
Manager*

**Parmenion**



**Alex Funk**

*Chief Investment  
Officer*

**PortfolioMetrix**



**Gemma Woodward**

*Head of Responsible  
Investment*

**Quilter Cheviot**



# Welcome back

ASG update

## Julia Dreblow

*Founder and CEO*

**SRI Services &  
Fund EcoMarket**



CLICK TO  
VISIT





# ASG Report

## built on diverse expertise

### Essential knowledge

- Sustainability issues
- Public attitudes to sustainability
- Regulation and Compliance
- Sustainable (and related) investment options

### Adviser framework

- Business
- Advice process

### Training framework



### Appendix includes:

Strategies & approaches, Asset selection basics, Glossary, Checklists: Compliance & DD, SDR explanations, Systemic risk, SWOT / business planning ideas, links to regs...



**Keynote Speaker**

**Solitaire Townsend**

*Co-Founder and Chief  
Solutionist*

**Futerra**



**FUTERRA**



# Solitaire Townsend

*Co-Founder and Chief Solutionist*

**Futerra**

A circular portrait of Solitaire Townsend, a woman with red hair and glasses, resting her chin on her hand.

FUTERRA

Solitaire is a renowned sustainability expert. She is Co-founder & Chief Solutionist at Futerra and Chair of The Solutions Union charity. In 2023, she was named 'Leader of the Year' at Adweek's Sustainability Awards and the United Nations Global Compact SDG Pioneer for the UK. She was also named by Positive News as one of three people transforming the climate narrative.

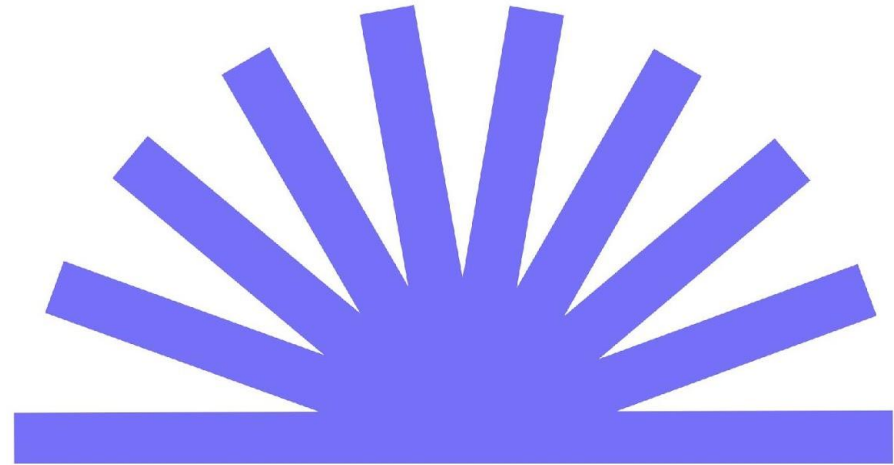
Her previous accolades include 'Ethical Entrepreneur of the Year', chair of the UK Green Energy Scheme, trustee of Ashden, and founder member of the United Nations Sustainable Lifestyles Taskforce. Additionally, she sits on the Board of the Hollywood Climate Summit.

Solitaire holds master's degrees in both Sustainability and Shakespeare. Her popular TED talk, Forbes column, and most recent book – The Solutionists – are available online, with her first novel Godstorm due to be published in January 2026.

A stylized sunburst or starburst graphic is positioned on the left side of the image. It consists of a central point from which several long, thin, triangular rays emanate outwards. The rays are colored in a light pink or rose gold shade, contrasting with the solid red background. The rays vary in length and angle, creating a dynamic, radiating effect.

**FUTERRA**





# CLIMATE SOLUTIONS OFFICIAL PROVIDER

**EXPONENTIAL  
ROADMAP** INITIATIVE



kao



Google



NETFLIX



Calvin Klein



MARS



DIAGEO



ESTÉE  
LAUDER  
COMPANIES







Extractive and  
Exploitative Economy

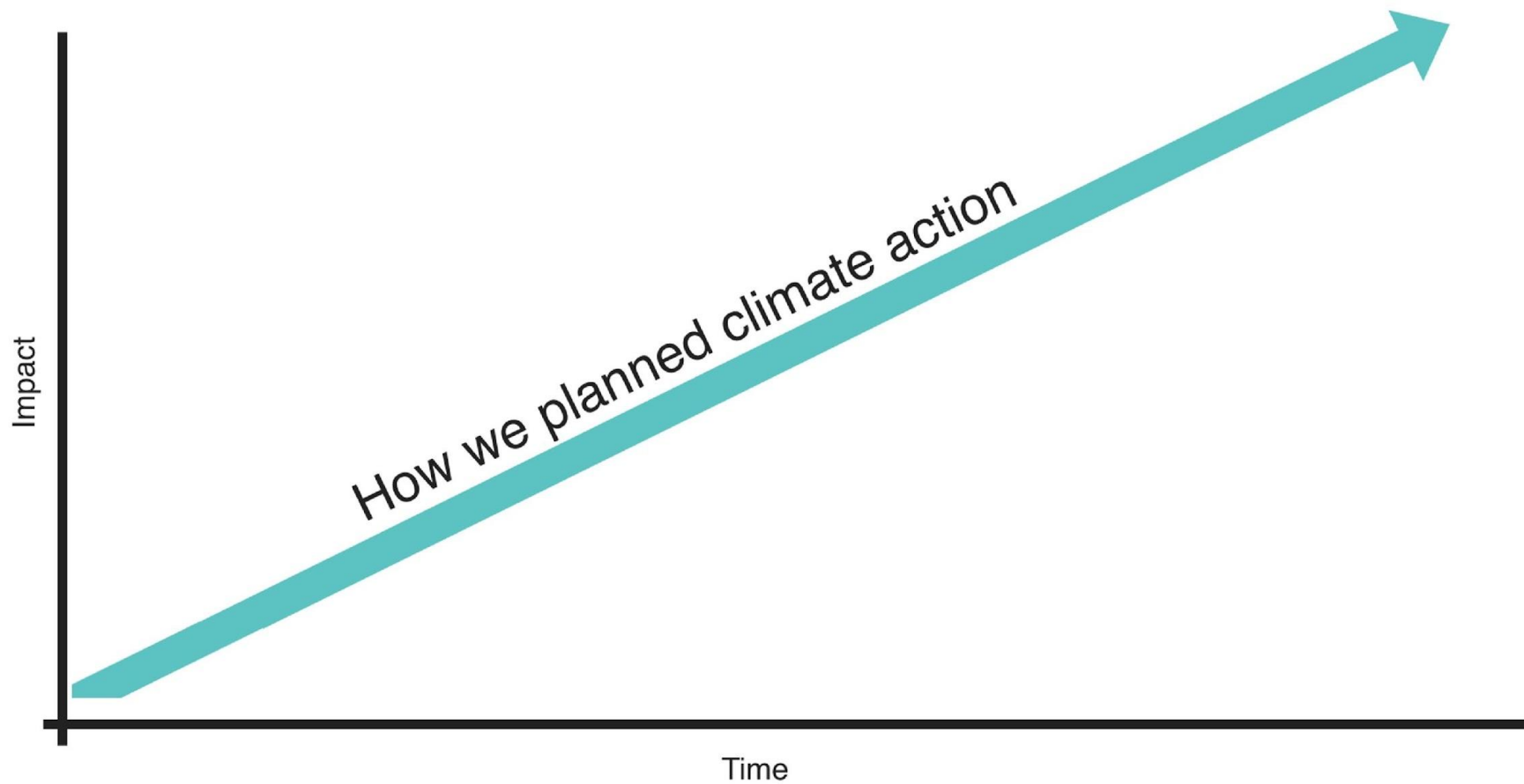


Solutions Economy



**HOW ARE  
WE DOING?**

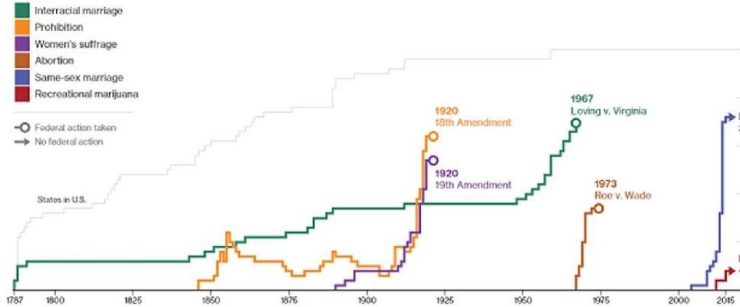




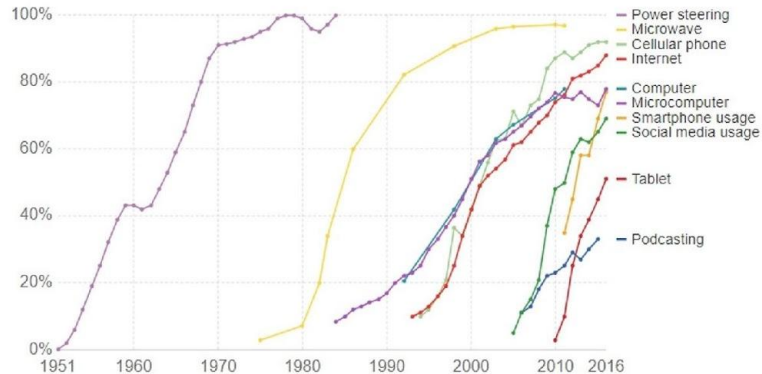
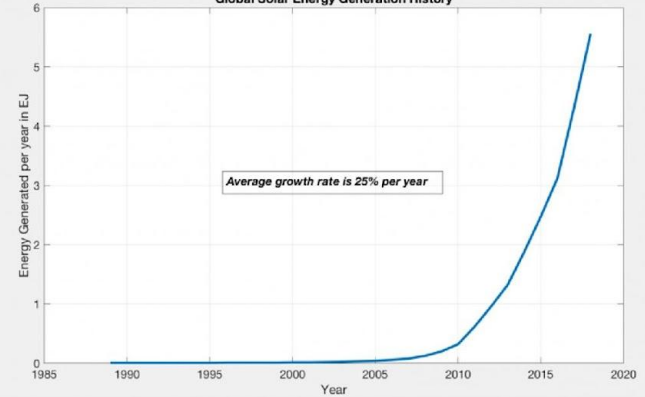
# This is how social change happens

## Tracking the Pace of Social Change

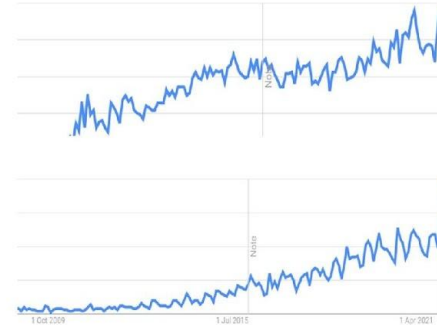
Number of states that have removed a ban, by year  
(Prohibition shows the number of states that enacted)



## Global Solar Energy Generation History



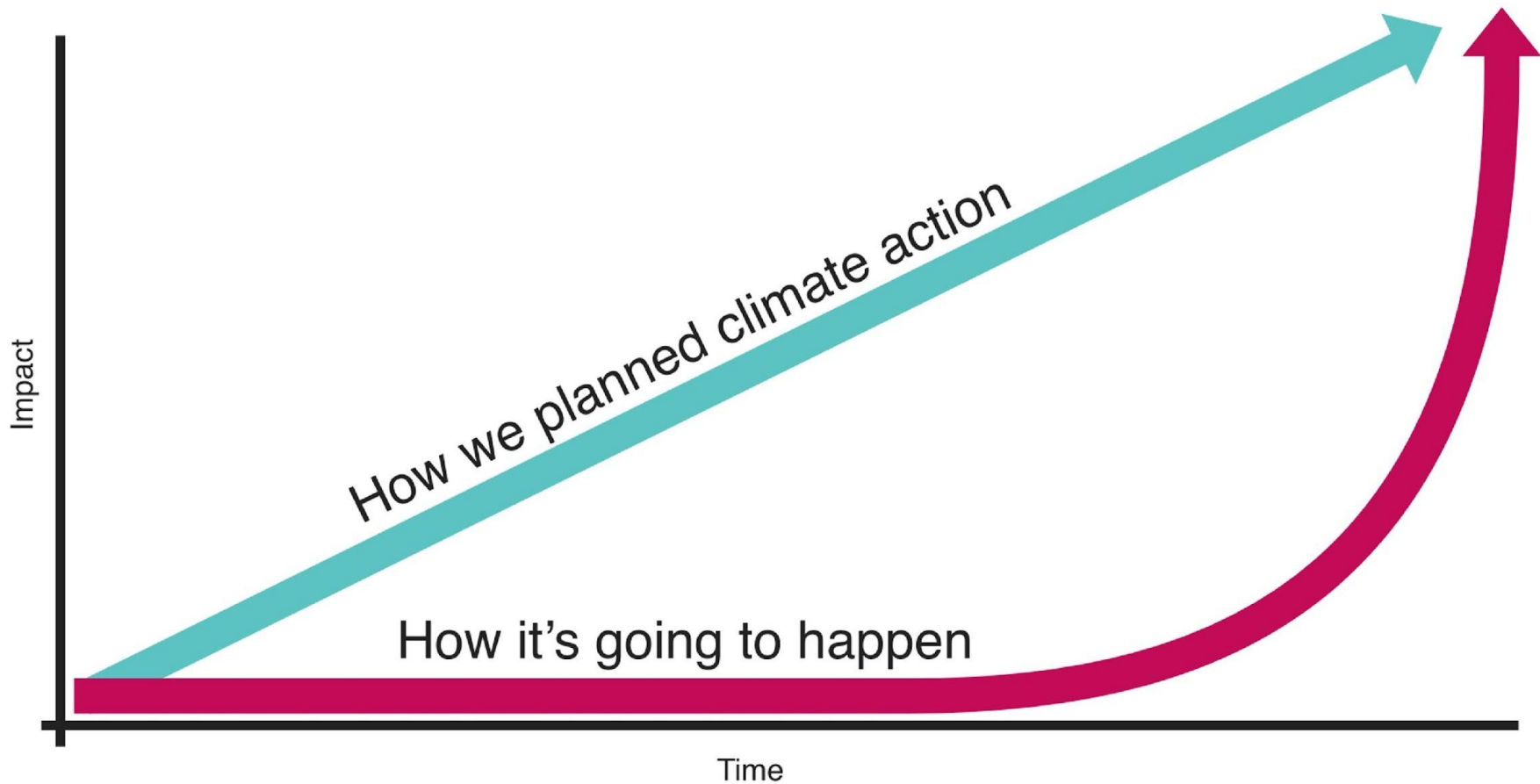
## Google Searches

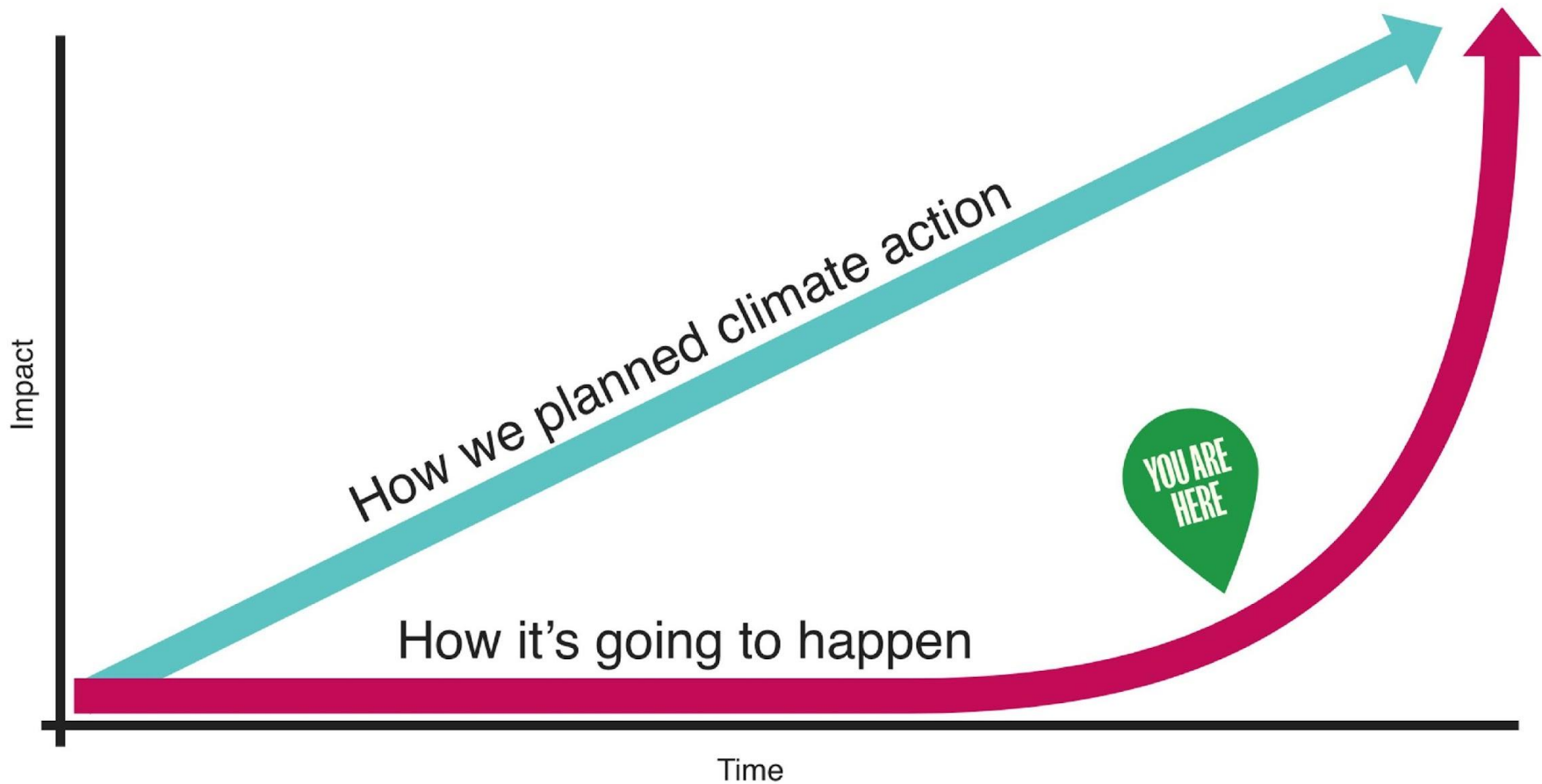


"Upcycling"

"Circular"









**“THE INTERNET WILL  
CATASTROPHICALLY  
COLLAPSE IN 1996.”**

Robert Metcalfe, founder of 3Com  
and co-inventor of Ethernet, 1995

**“THE HORSE IS HERE TO  
STAY, BUT AUTOMOBILE IS  
ONLY A NOVELTY – A FAD.”**

Advice to Henry Ford's lawyer, c.1910

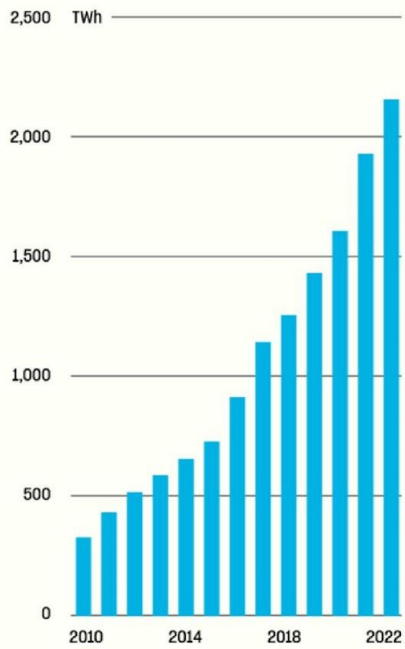
**“RAIL TRAVEL AT HIGH SPEED IS NOT POSSIBLE  
BECAUSE THE PASSENGERS, UNABLE TO  
BREATH WOULD DIE OF ASPHYXIA.”**

Dionysius Lardner, UCL Professor, c.1830

# EXPONENTIAL GROWTH IS UNDERWAY FOR RENEWABLE TECHNOLOGIES



## WIND GENERATION

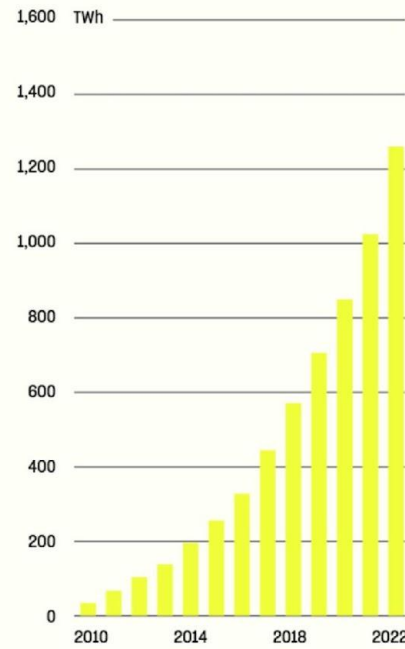


CAGR  
FUTERRA

**15%**



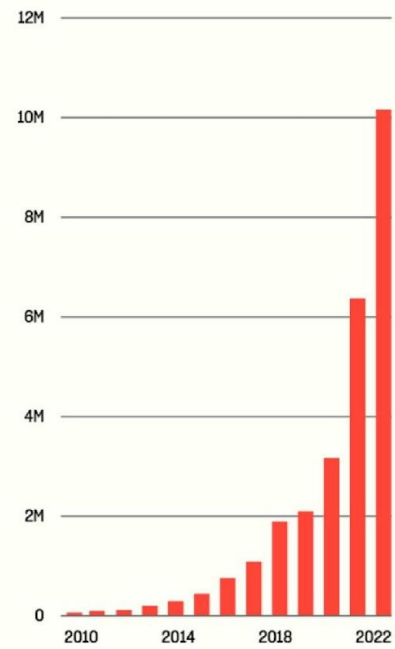
## SOLAR GENERATION



**29%**



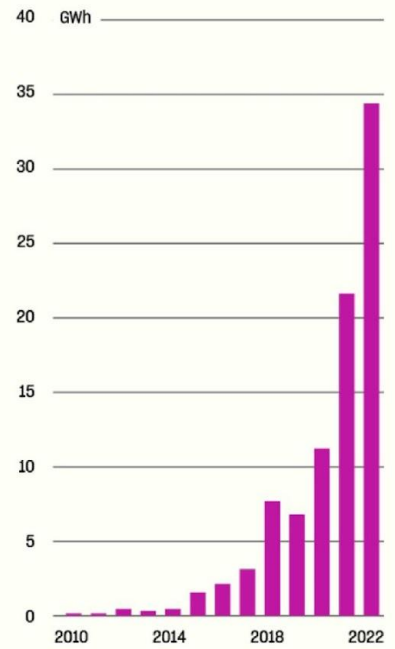
## ANNUAL EV SALES



**58%**



## ANNUAL BATTERY SALES

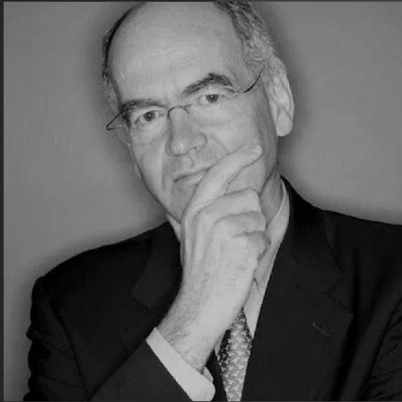


**54%**

Source: RMI Renewables Revolution, 2023. Global data from BNEF, BP, Ember.



**THERE ARE  
WAVES**



“We’re in a sustainability recession...  
the wider economic, social and  
political contexts mean that we have to  
reinvent sustainability on the fly.”

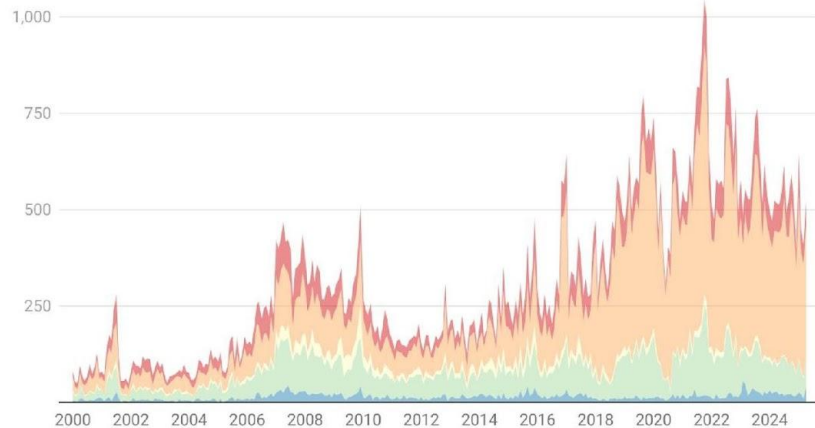
- John Elkington,  
March 2024



## Growing U.S. newspaper coverage of climate change, 2000 through early 2025

The New York Times and Washington Post contribute the largest number of articles.

USA Today Washington Post Wall Street Journal New York Times Los Angeles Times



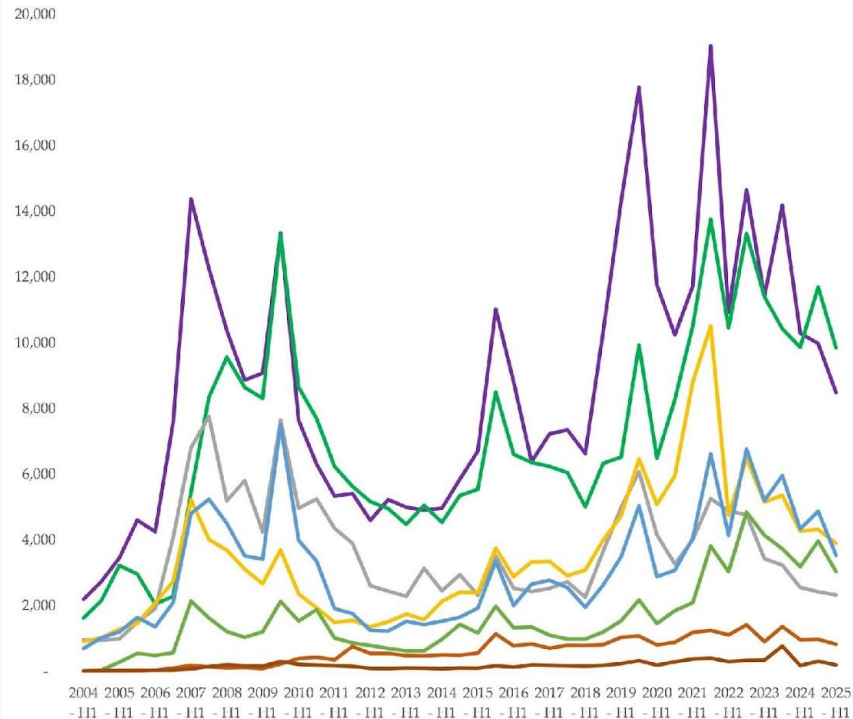
Data show the number of articles per month, based on NexisUni searches for any articles mentioning either 'climate change' or 'global warming.'

Chart: Chris Mooney • Source: Boykoff et al, 'United States Newspaper Coverage of Climate Change or Global Warming, 2000-2025,' University of Colorado, CIRES • Created with Datawrapper

## Total media articles mentioning climate change or global warming

Boykoff, M., Aoyagi, M., Baltamias, A.G., Benham, A., Bruns, C., Chandior, P., Daly, M., Doi, K., Fernández-Rojas, R., Hawley, E., Hwang, K., Lee, K., Lyytikäinen, J., McAlister, L., Mervala

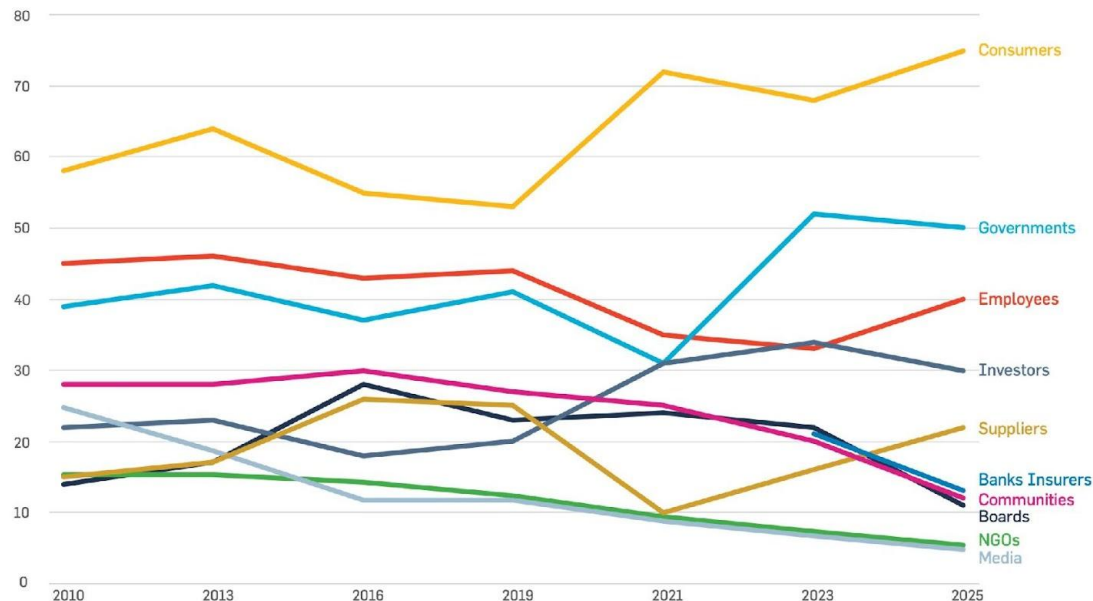
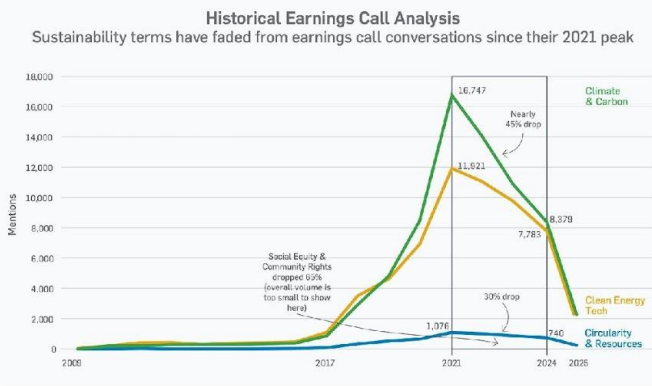
Europe Asia Oceania  
North America International Wire Services Central/South America  
Africa Middle East



**88%**  
of CEOs say the  
business case is  
stronger today  
than five years ago

**99%**  
of CEOs are  
staying the course  
on sustainability  
commitments

As the pressures on CEOs have evolved over the past five years, the importance of consumers and governments has risen while that of financial institutions has waned



Source: UNGC/PWC CEO SURVEY 2025



Price Thresholds at 50% Probability of Being Too Expensive  
(by T-Shirt Type and Age Group)



Q heat pumps



**+100%** over the past five years, reaching an all time high in 2024

Q thrifting



**100%+** over the past 3 years, reaching an all time high in 2023

Q energy saving device



**15 year high** in 2023 in the US

Q electric vehicles



**+100%** over the past 2 years

Q how to save fuel



**+55%** from 2022 to 2023

Q solar installation



**+100%** over the past 5 years

Q ebikes



**+100%** over the past 5 years

Q reduce food waste



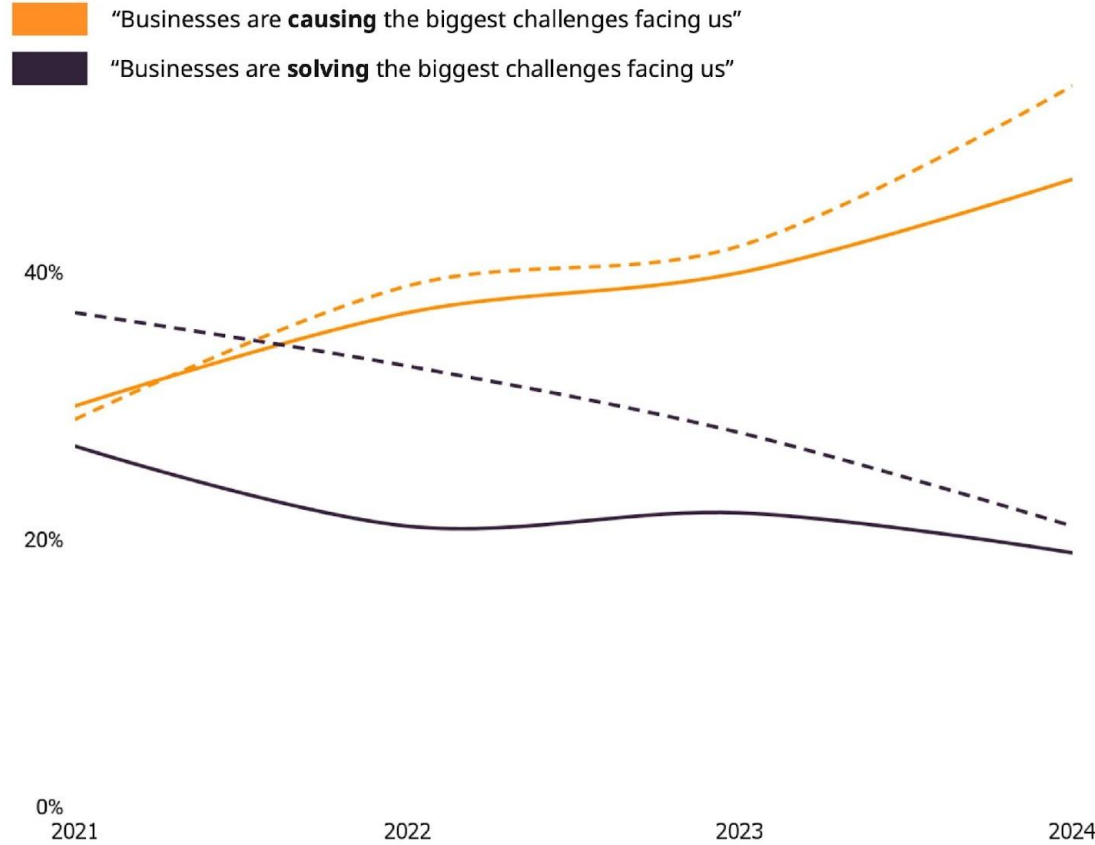
**+100%** over the past five years, reaching an all time high in 2023

Q recycling



**Highest** of any sustainability action as of April 2024





#### Risk categories

- Economic
- Environmental
- Geopolitical
- Societal
- Technological

#### 2 years

1 <sup>st</sup>	Misinformation and disinformation
2 <sup>nd</sup>	Extreme weather events
3 <sup>rd</sup>	State-based armed conflict
4 <sup>th</sup>	Societal polarization
5 <sup>th</sup>	Cyber espionage and warfare
6 <sup>th</sup>	Pollution
7 <sup>th</sup>	Inequality
8 <sup>th</sup>	Involuntary migration or displacement
9 <sup>th</sup>	Geoeconomic confrontation
10 <sup>th</sup>	Erosion of human rights and/or civic freedoms

#### 10 years

1 <sup>st</sup>	Extreme weather events
2 <sup>nd</sup>	Biodiversity loss and ecosystem collapse
3 <sup>rd</sup>	Critical change to Earth systems
4 <sup>th</sup>	Natural resource shortages
5 <sup>th</sup>	Misinformation and disinformation
6 <sup>th</sup>	Adverse outcomes of AI technologies
7 <sup>th</sup>	Inequality
8 <sup>th</sup>	Societal polarization
9 <sup>th</sup>	Cyber espionage and warfare
10 <sup>th</sup>	Pollution

#### Source

World Economic Forum Global Risks  
Perception Survey 2024-2025.

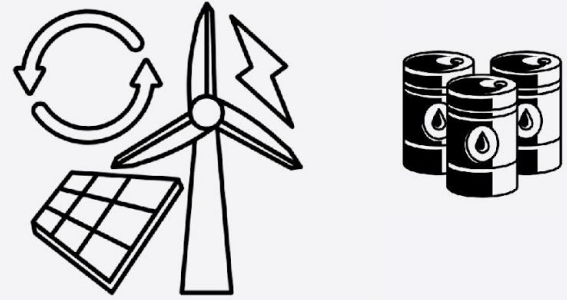


**WE NEED NEW  
STORIES**

# Frame Solutions As Mainstream Not Alternative



Alternative' energy = minor/sidelined to normal energy



'Renewable' energy = mainstream and normal



# Frame Sustainability Choices As Benefits Not Sacrifices



Give up meat for the planet



Eat more plants for health

# Personal Benefits Motivate More Than Collective Ones



This Policy For Green Jobs Can Boost  
Our Economy



Learning One Green Skill Will Boost  
Your Salary



# Make Sustainable Products Desirable Not Worthy



Nike Considered Shoe 2004  
30% Less Waste.  
Sold as green.



Nike Flynit Shoe 2016  
60% Less Waste.  
Sold as speed.

# We Believe Stories Over Facts (And That's A Fact)



Electric cars have an average  
250 mile range



Jane's EV cost £5 for all her  
Christmas holiday travel



# FRAMING ESG FOR 2026

# COMMERCIAL

- **Highlight financial returns:** Emphasize how ESG initiatives improve efficiency, reduce costs, and create shareholder value.
- **Showcase innovation:** Frame sustainability efforts as drivers of technological advancement and product breakthroughs.
- **Focus on customer benefits:** Position sustainable products/services as upgrades
- **De-politicize the narrative:** Stick to pragmatic, results-oriented language that speaks to people across the political spectrum.



# COMPASSIONATE

- **Emphasize shared humanity:** Use storytelling to show how ESG efforts benefit real people and communities.
- **Appeal to empathy:** Tap into positive emotions with messages that center care and positivity.
- **Promote responsibility:** Highlight the company's long-term commitment to ethical practices, corporate responsibility and community welfare.
- **Foster trust:** Use a tone that reinforces the company's accountability and transparency.



# COMMERCIAL

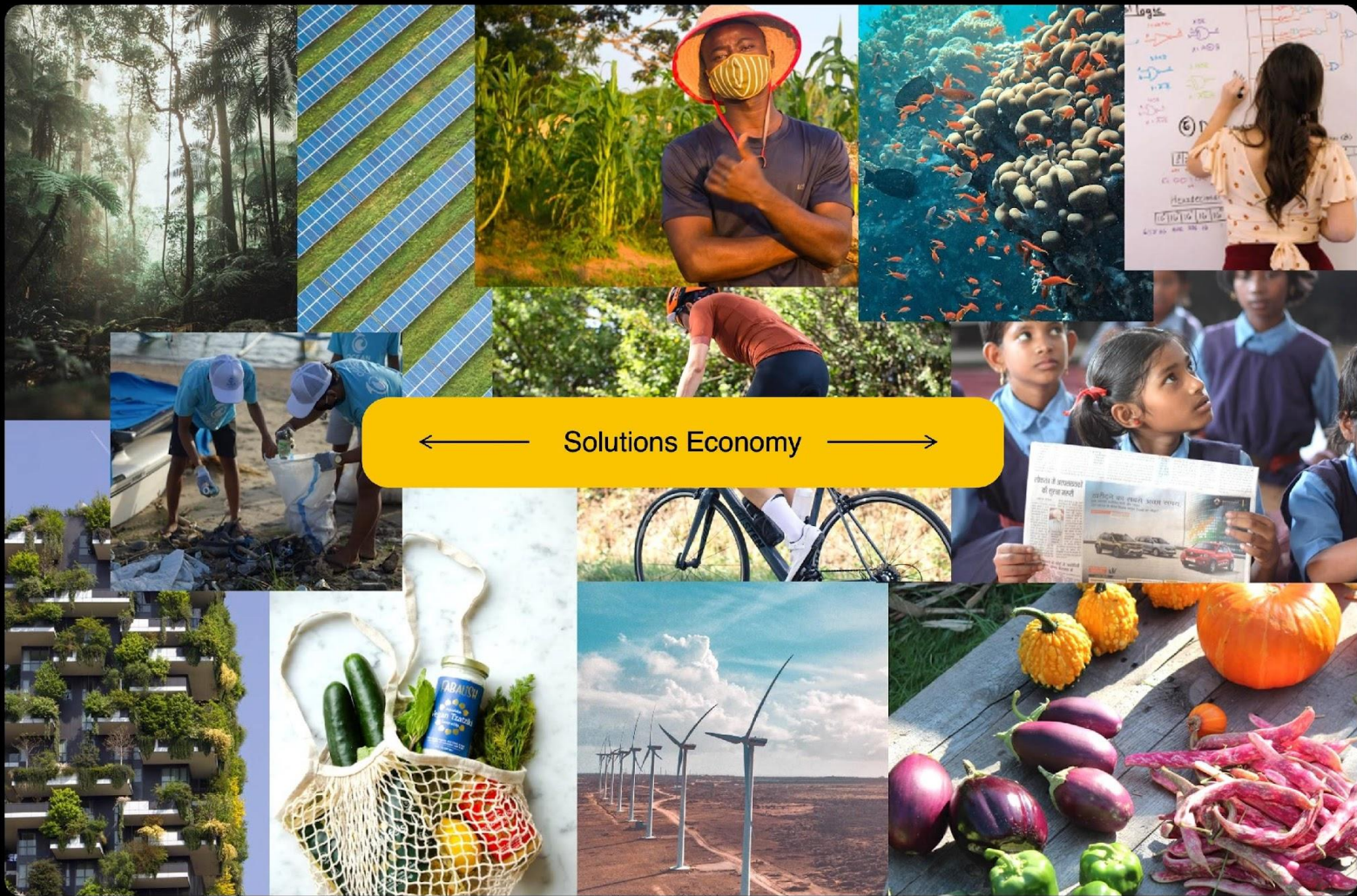
- Managing risks
- Investing in innovation
- Committing to customers
- Cutting waste
- Looking forward
- Being accountable



# COMPASSIONATE

- Giving back
- Respecting our team/staff
- Supporting communities
- Treating people fairly
- Great employer
- Caring about nature

Extractive  
and  
Exploitative  
Economy







# THANK YOU

New York  
55 Prospect Str, Suite 301  
Brooklyn  
NY 11201

London  
Somerset House, Strand  
London  
WC2R 1LA

Mexico City  
Arbol 45, San Angel  
Ciudad de Mexico 01000

# Fund Manager Panel: Nature – growing opportunities to make money and do good on land and in the oceans



**Charlie Annis**  
*Fund Manager, Nature &  
Biodiversity Solutions Fund*  
**M&G Investments**



**Yi Shi**  
*Client Portfolio Manager &  
Engagement Specialist*  
**Pictet Asset Management**



# Charlie Anniss

*Fund Manager, Nature & Biodiversity Solutions Fund*

**M&G Investments**



Charlie re-joined M&G in February 2025 to support the Sustain & Impact team. He joins from Union Bancaire Privée, where he launched the Europe Small Cap Equity fund, and subsequently worked as part of the Positive Impact team, launching and co-managing UBAM Biodiversity Restoration, and co-managing Positive Impact Global Equity.

Prior to Union Bancaire Privée, Charlie worked at M&G for over 15 years, where he managed the M&G European Smaller Companies fund and the M&G European fund, as well as working on global equity strategies.

Charlie started his career with M&G in 2000, after he graduated from the University of Bristol with a degree in French and Spanish and he is a CFA charter holder.



# Yi Shi

*Client Portfolio Manager & Engagement Specialist*

**Pictet Asset Management**



Yi Shi joined Pictet Asset Management in 2022 as a Client Portfolio Manager and Engagement Specialist in the Thematic Equities team.

Prior to Pictet, Shi worked for Royal Bank of Canada in their wealth management business advancing ESG integration into equity investments, advisory, and research. He has also held roles with Rhode Island Infrastructure Bank and Connecticut Green Bank focused on clean energy and green infrastructure initiatives. Shi received a B.A. in Physics and a B.S. in Society and Environment from the University of California, Berkeley. He also received a Master of Environmental Management from Yale University's School of the Environment, and an MBA in Funds Management from the University of Toronto, Rotman School of Management.



# Good Money Week update

**James Alexander**

*Chief Executive Officer*

**UKSIF**



**UKSIF**

UK Sustainable Investment  
and Finance Association



# James Alexander

*Chief Executive Officer*

## UKSIF



James is Chief Executive of UKSIF, driving the organisation's objective of advancing sustainable investment and finance in the UK, and also serves as Chair of the Global Sustainable Investment Alliance (GSIA), working to unlock the power of the worldwide financial services industry to accelerate the transition to a sustainable future.

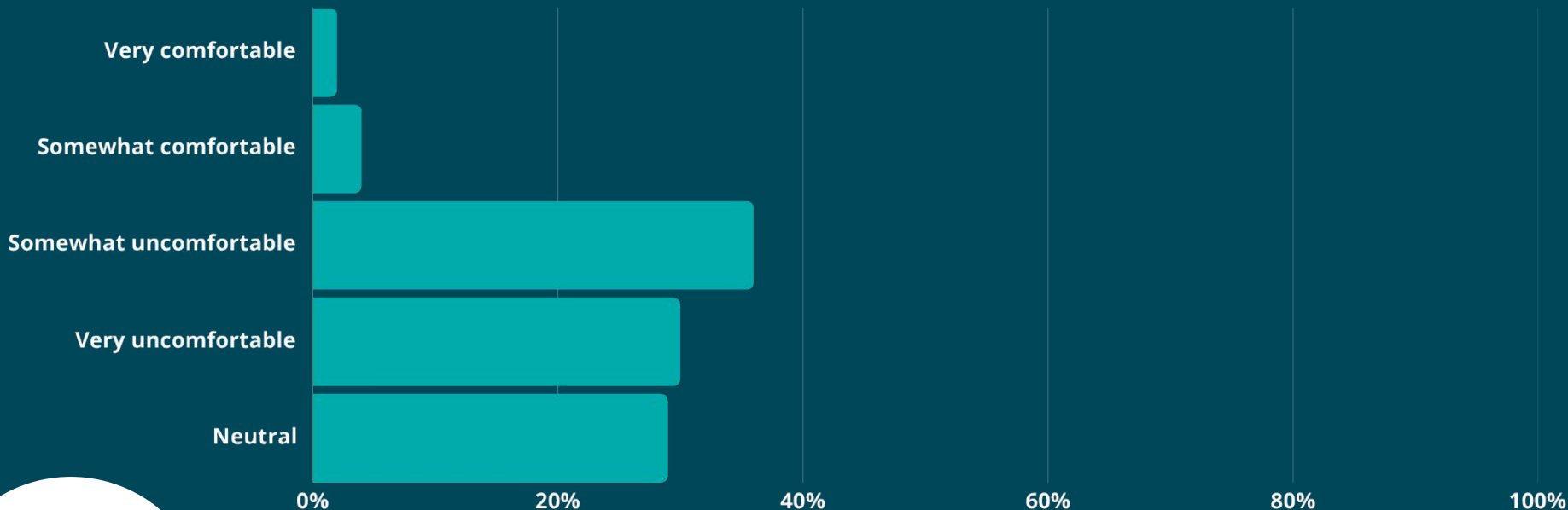
James joined UKSIF in 2020 with a background in international climate finance and infrastructure finance as well as many years' experience in leadership roles in membership organisations. Since then, UKSIF has grown substantially, now representing over 300 organisations, collectively managing over £19tn. He has also overseen the expansion of UKSIF's communications, public affairs and events programmes, increasing the organisation's capacity to influence decision makers, promote sustainable finance in the media, and facilitate industry collaboration.

James has represented UKSIF at Treasury and DWP select committees and is a member of multiple government and regulatory working groups. In August 2023, he was appointed Chair of the Global Sustainable Investment Alliance, and he has also served as Treasurer of Eurosif, the European Sustainable Investment Forum. In November 2023, James was awarded Outstanding Individual Contribution to the ESG Investment Industry at the Clear Path Analysis ESG Investment Leader Awards.

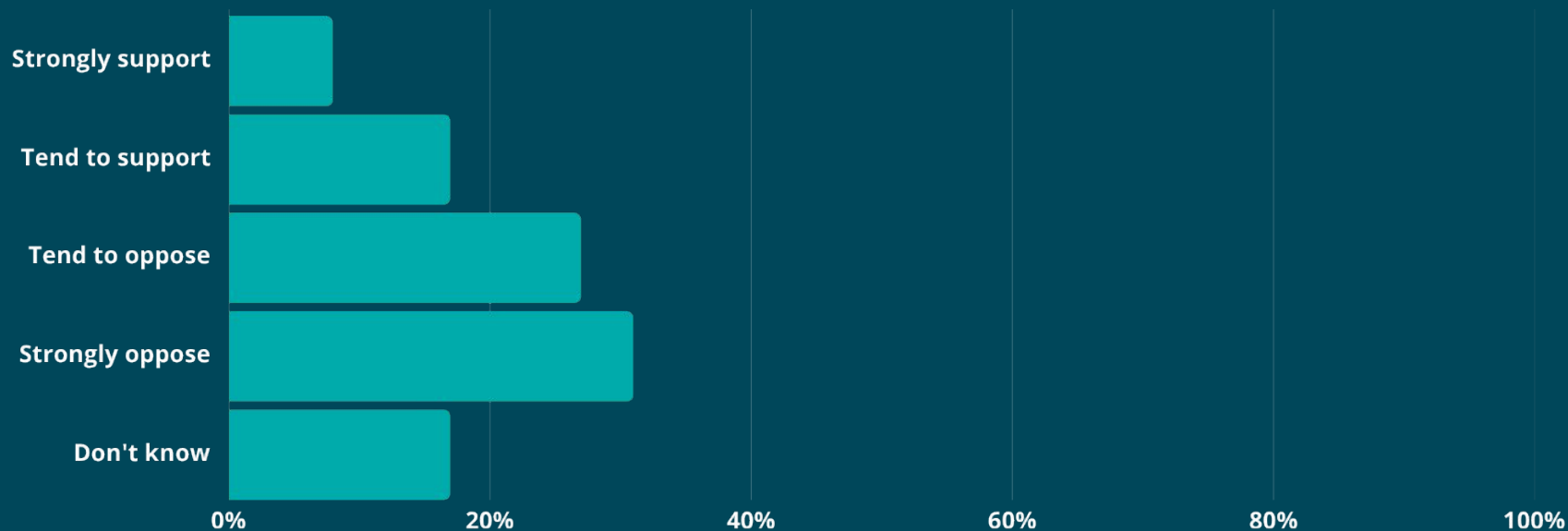
Previously, James supported global megacities to overcome the substantial barriers to financing climate action as Director of the City Finance Programme at the C40 Cities Climate Leadership Group and Head of the C40 Cities Finance Facility – a project preparation facility he developed, now supporting cities across the world to structure nearly a billion dollars of sustainable infrastructure transactions. James has worked on international climate finance issues at the UN level and remains a member of the UN SDSN Global Commission for Urban SDG Finance, Chaired jointly by Jeffrey Sachs and the Mayors of Paris and Rio de Janeiro



# To what extent are you comfortable or not comfortable with your savings/pensions being invested in companies which are negatively impacting the environment and climate?

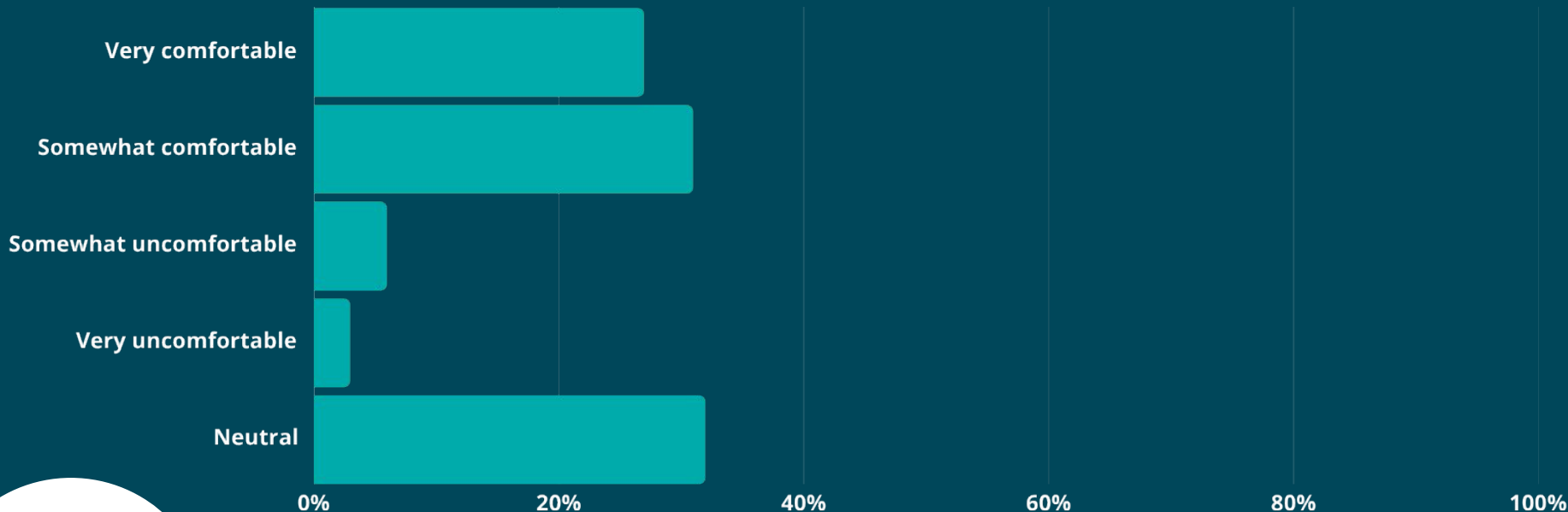


# To what extent would you support or oppose your pension being invested in companies involved in fracking (shale gas extraction)

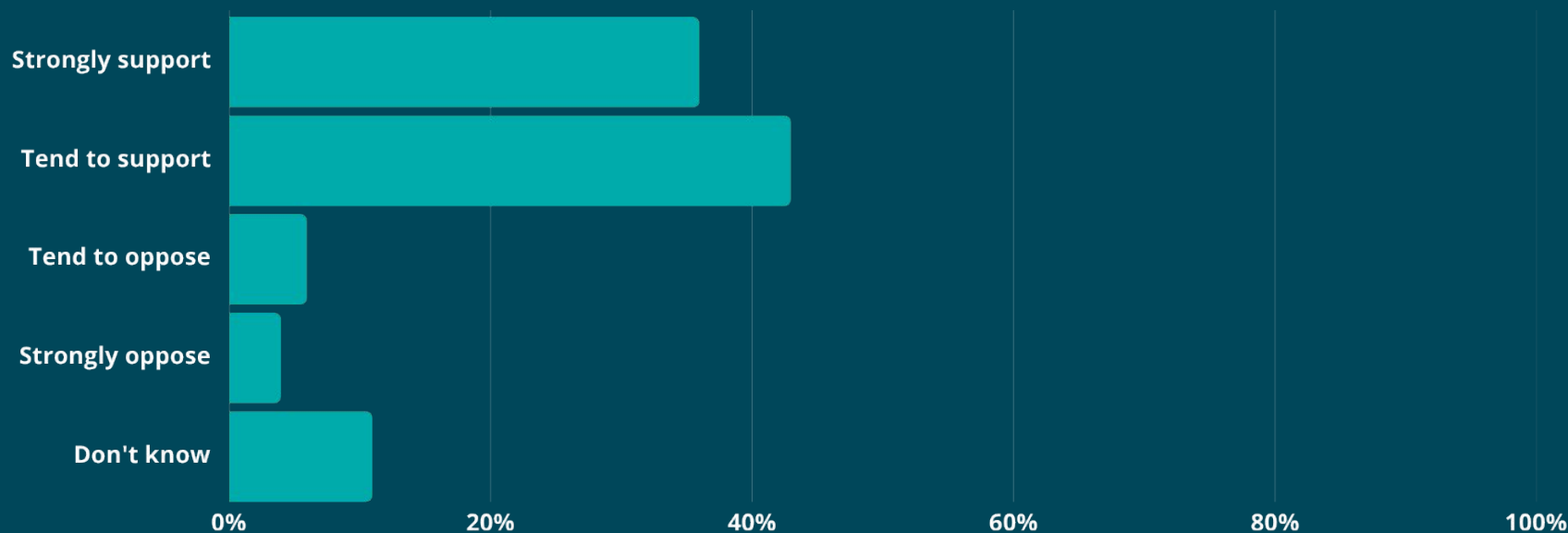




# To what extent are you comfortable or not comfortable with your savings/pensions being invested in companies which are helping to solve environment and climate issues?

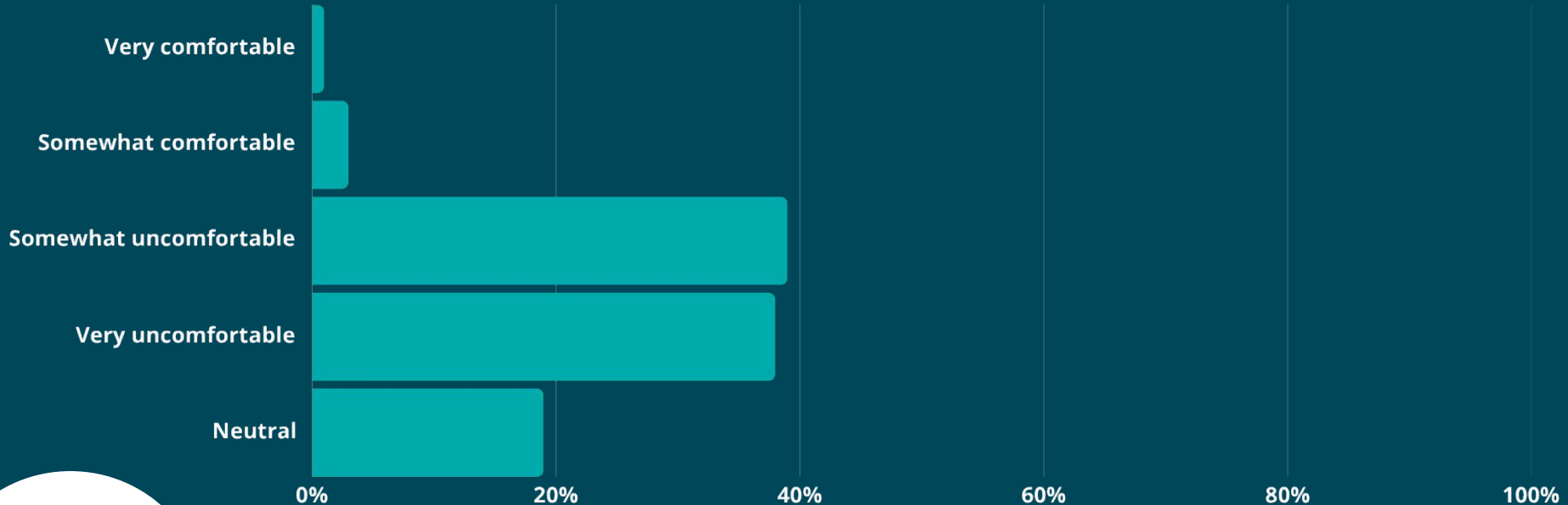


## To what extent would you support or oppose your pensions being invested in renewable energy?

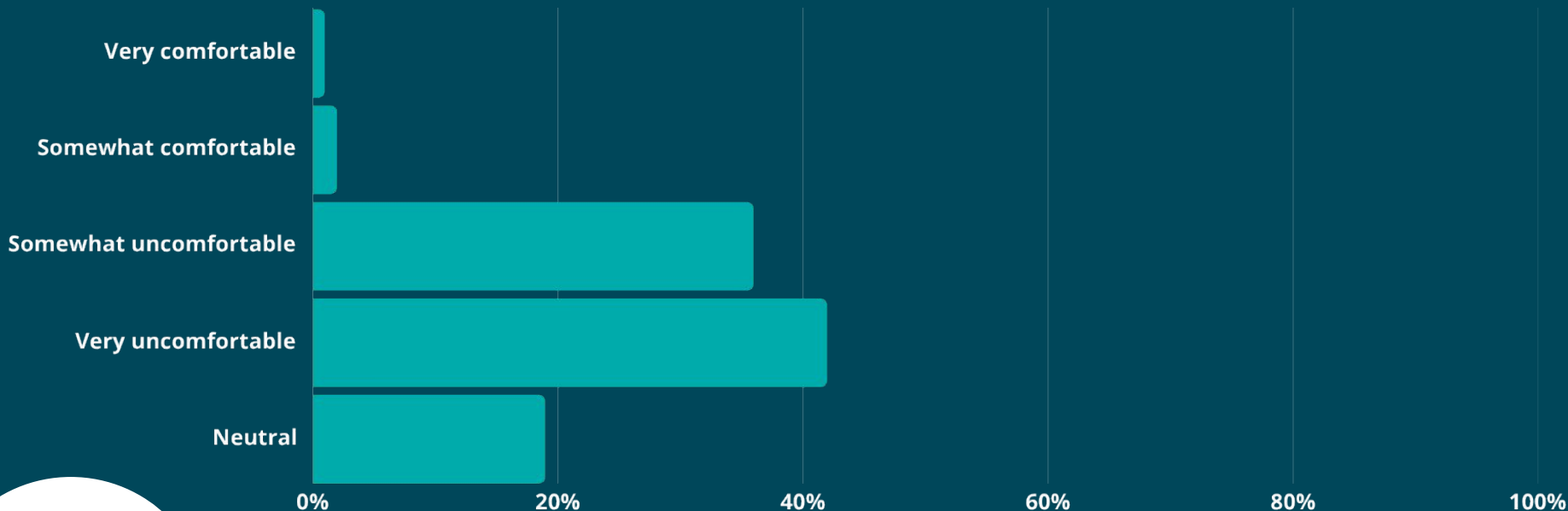




# To what extent are you comfortable or not comfortable with your savings/pensions being invested in companies which are treating their staff badly?

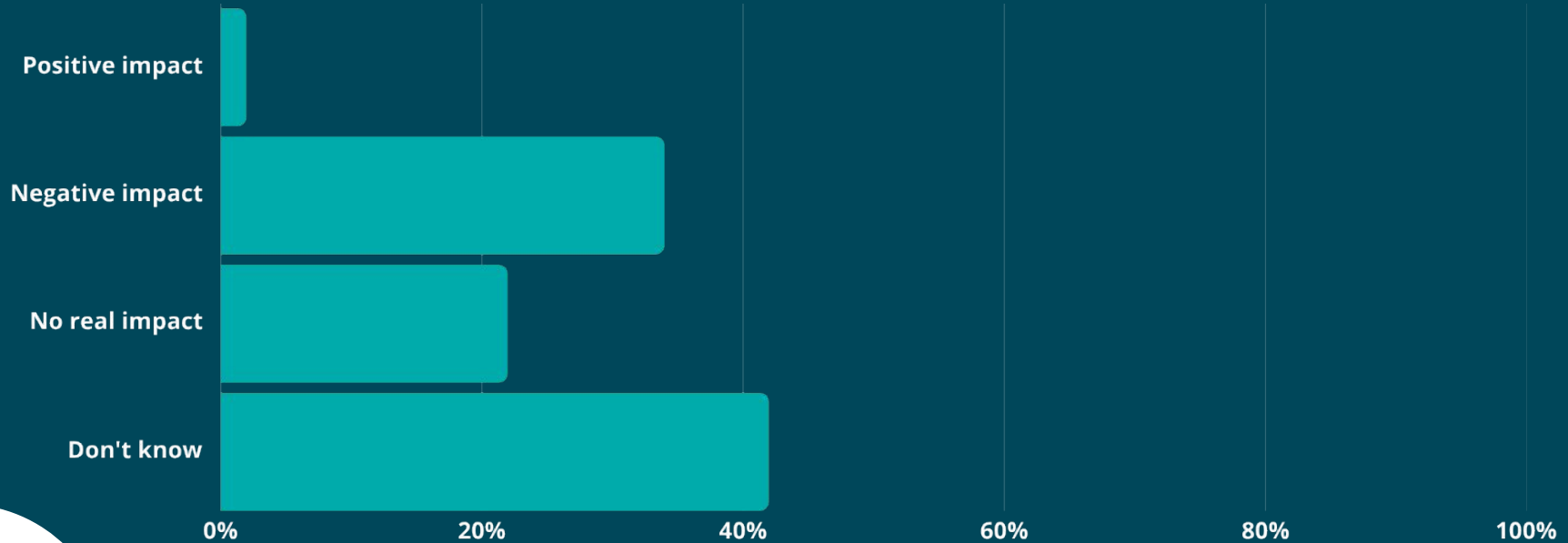


# To what extent are you comfortable or not comfortable with your savings/pensions being invested in companies which are treating their customers badly?

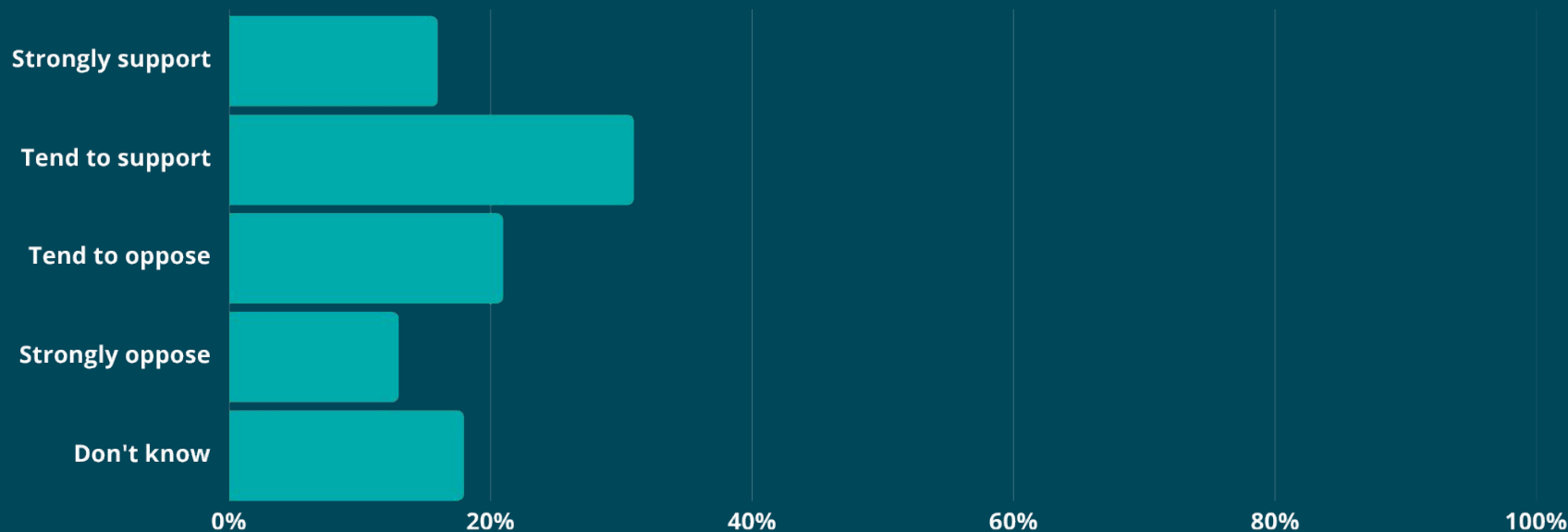




## Generally speaking, what impact, if any, do you think extreme weather has on the value of investments?

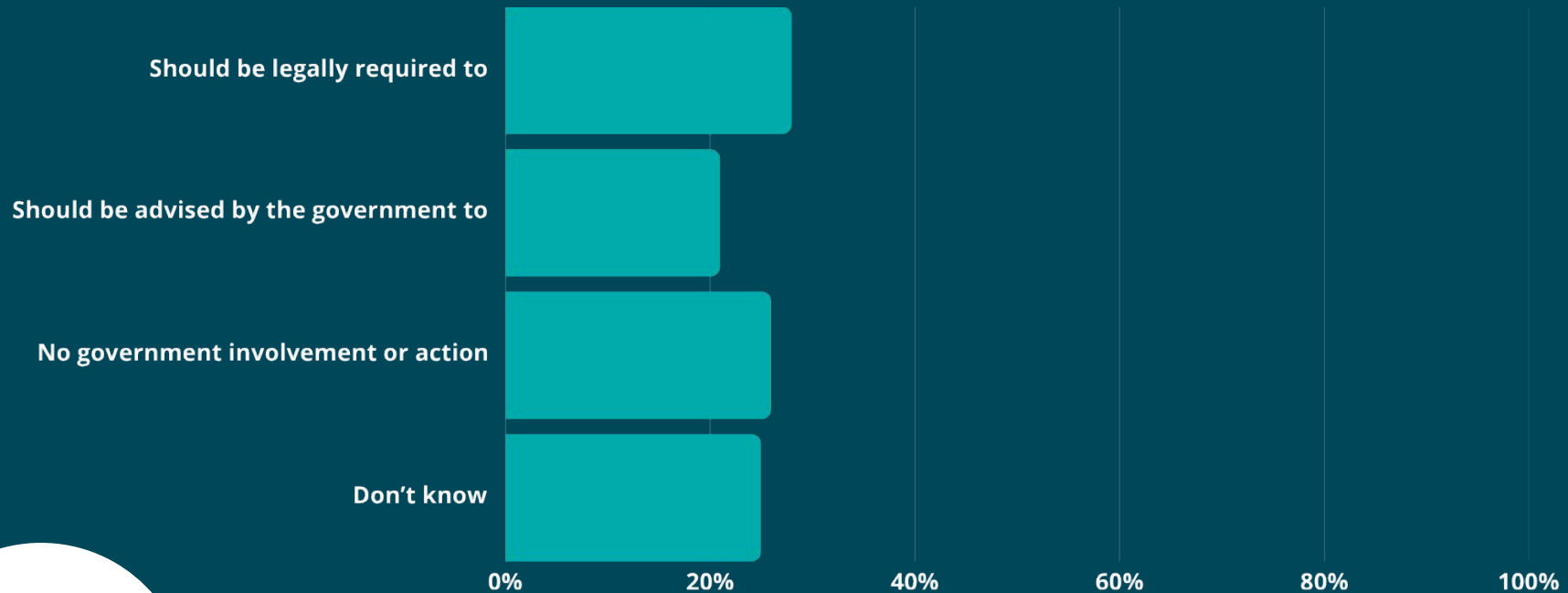


## To what extent would you support or oppose your pensions being invested in defence companies?





# Thinking about the government's role in deciding how much pension funds invest in the UK, which of the following comes closest to your view?



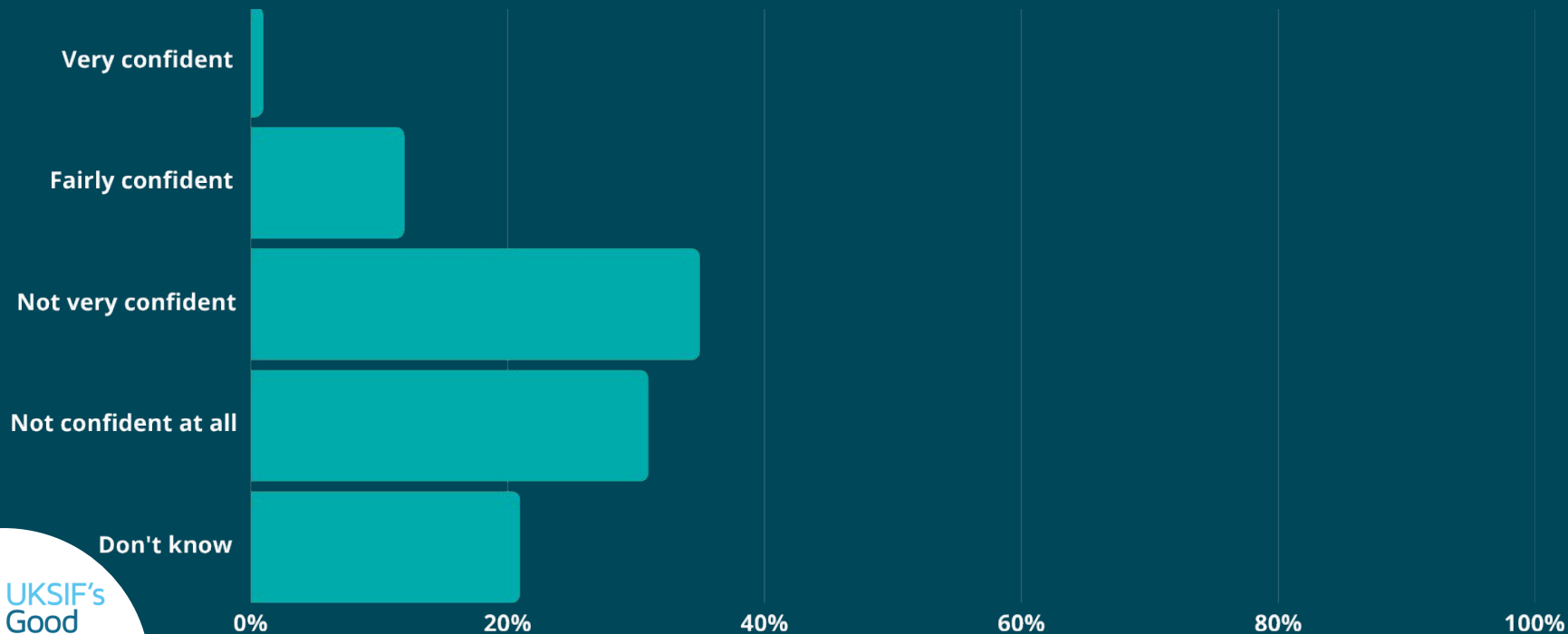
# Thinking about the investments from your pension(s), is it generally more important to you that you see a high rate of return, or that your provider is investing in companies and projects based within the UK?

It is more important that my investments see high rates of return, even if that means my provider is not investing in companies and projects based within the UK	32%
It is more important that my investments see high rates of return, but whether or not my provider is investing in companies and projects based within the UK should be considered	24%
Seeing high rates of return, and investing in companies and projects based within the UK are equally important	19%
It is more important that my provider is investing in companies and projects based within the UK, but the rate of return on my investments should be considered	5%
It is more important that my provider is investing in companies and projects based within the UK, even if that means I see a lower rate of return on my investment	1%
Don't know	19%



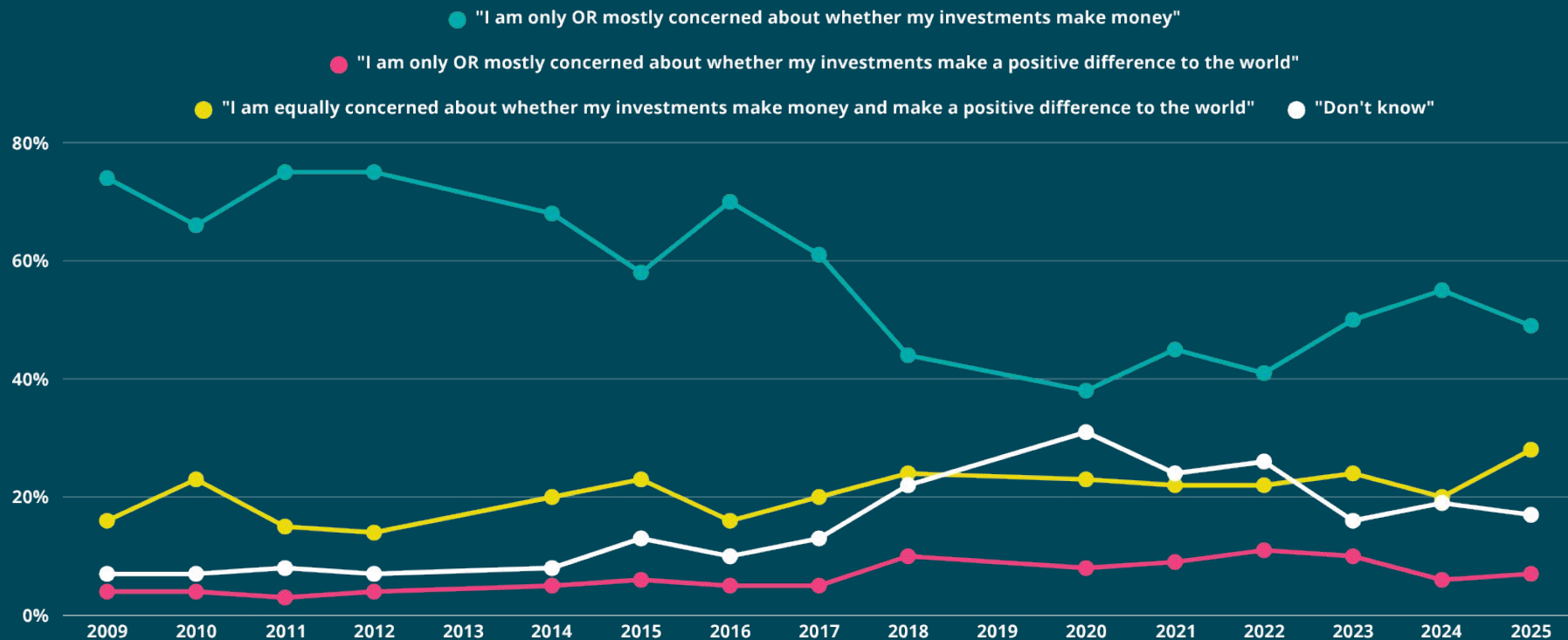


**Local Government Pension Scheme funds are overseen by councillors, who help decide how contributions are invested. How confident are you, if at all, that councillors make decisions in the long-term interests of pension scheme members?**





# Considering how and where you invest your money (including green and ethical investments), which, if any, of the following statements comes closest to your view?



# Fund Manager Panel: Reasons to be Cheerful – part 2



**Eloise Robinson**

*Portfolio Manager, Multi Asset  
Solutions*

**Columbia Threadneedle  
Investments**



**Seb Beloe**

*Managing  
Director*

**Foresight**



**Mike Appleby**

*Investment Manager,  
Sustainable Future Funds*

**Liontrust Asset  
Management**



# Eloise Robinson

*Portfolio Manager, Multi Asset Solutions*

## **Columbia Threadneedle Investments**

Eloise joined the company in 2017 and is a Portfolio Manager in the Multi-Asset team. On a day-to-day basis Eloise manages the CT Sustainable Universal MAP range and works closely with our Responsible Investment team. Eloise has an honours degree in Physics from Durham University and is a CFA charterholder.





# Seb Beloe

*Managing Director*

**Foresight**



Foresight

Seb Beloe is a Managing Director and is based in our London office. Prior to Foresight, Seb worked at WHEB Asset Management as a Partner. Seb holds a BSc in Environmental Science from the University of East Anglia, an MSc DIC from Imperial College London and is a Chartered Environmentalist.



# Mike Appleby

*Investment Manager, Sustainable Future Funds*

## **Liontrust Asset Management**



Mike Appleby is an Investment Manager on the Liontrust Sustainable Investment team, with responsibility for the generation and integration of SRI research into the funds and portfolios. Mike joined Liontrust in April 2017 as part of the acquisition of Alliance Trust Investments (ATI). Having started his career in the investment industry in 1992, Mike joined Aviva Investors in 2004 as a Research Analyst. He was a Fund Manager from 2006 to 2010 and was then appointed as Head of SRI Thematic Research. Previously, he attained an MSc in Environmental Management at Imperial College, London. Prior to that, he was an Investment Analyst at TASS Management. Mike started his career on Lehman Brothers' trading desk and holds a BSc (Hons) in Biological Sciences from the University of Edinburgh and the CFA Society of the UK Investment Management Certificate (IMC).



# Close and next steps

**Julia Dreblow**

*Founder and CEO*

**SRI Services & Fund  
EcoMarket**



CLICK TO  
VISIT





# Closing remarks

## What have we heard today?

- Serious but solvable if we transition swiftly
- Many companies are doing great work - we have the technology / skills
- Need to collaborate across and throughout investment chain

## Change will continue

- SDR will evolve
- ASG report... soon
- See Fund EcoMarket for free research & due diligence

## What next?

- Thank you ... & two questionnaires (& CPD)
- Reason to be Cheerful - part 3!





# Thank you for joining us and to our event partners

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