

Amova SRI Equity Fund

The Amova Socially Responsible Investment (SRI) Equity Fund provides a powerful combination of specific exclusions and Environmental Social and Governance (ESG) integration, which considers the sustainability of companies and involves actively engaging with management to help drive positive change and help create a better world.

The fund deliberately avoids investing in certain companies, industries, and sectors and aims to align with your personal values, while still providing competitive returns.

We have offered the Wholesale SRI Equity Fund since 2001 and this is now available to retail investors via the following two funds:

- Amova SRI Equity Fund
- GoalsGetter Amova SRI Equity Fund

About the Strategy

- Generally holds 30–35 New Zealand and Australian companies
- Actively managed by dedicated Portfolio Manager, Michael De Cesare, and supported by our highly regarded NZ Equity team
- ESG issues are aligned with our long-term investment horizon
- We undertake ESG research directly and also integrate high-quality third party ESG research into our investment process
- Our NZ investment team is supported by our ESG Global Steering Committee

SRI Exclusions

Companies with over 10% of revenue from the following industries:

- | | |
|---|---------------------------------|
| ✗ | Adult entertainment |
| ✗ | Alcohol |
| ✗ | Controversial weapons/armaments |
| ✗ | Fossil fuels |
| ✗ | Gambling |
| ✗ | Tobacco |

Reasons to choose Amova SRI Equity

- ✓ Launched in 2001 it is one of the longest running SRI funds in New Zealand.
- ✓ The only single sector SRI Australasian equity KiwiSaver fund.
- ✓ We believe that the best screen is active management. We actively engage with companies and can influence their ESG decision making.
- ✓ A dedicated and skilled portfolio manager, backed by an experienced Auckland-based team.
- ✓ Global best practice, being a part of a specialist global investment manager provides the advantage of partnering local knowledge and experience with significant global resources.

How SRI restrictions are applied

Restrictions within the fund are monitored directly by the portfolio manager and analysts within the Amova NZ Equity team. Publicly available data may be limited, and the portfolio manager will engage directly with companies to get additional information. From there, restriction monitoring is updated on an ongoing basis from companies as and when new information becomes available. Revenue thresholds will be reviewed periodically, at least once a year.

The Amova approach to ESG

ESG principles are a pillar of our corporate identity. The application of ESG covers our overall approach to investment. This is backed by the Amova ESG Global Steering Committee, which includes the heads of all our investment teams across the world. The Amova Group has been a signatory to the UN Principles for Responsible Investment (PRI) since 2007.

We believe our role as a fund manager is to be a responsible steward of your capital, and to be clear and transparent about where your money has been invested and why it has been invested in that way. We believe integrating ESG is key to doing this and in creating future value for you.



Michael De Cesare
Portfolio Manager,
Amova NZ

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Click here for more information

Visit us www.goalsgetter.co.nz/amova-am-sri-equity-fund
Email us NZdistribution@amova-am.com
Call us 0800 303 308

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