

This item is for investment professionals only and should not be relied upon by private investors.

Sustainable Investment Finder

Matching sustainable funds to specific client preferences can be a real challenge, especially given fund approaches can vary significantly. Our Sustainable Investment Finder is designed to make the process much easier. It quickly identifies potential solutions for any given client by allowing you to search for funds through selecting filters that reflect what matters most to the client.

The tool has been developed in collaboration with Julia Dreblow and her colleagues at SRI Services, an independent business with over three decades of experience in sustainable investments. Julia has specialised in sustainable investment for over 25 years and was appointed to the Financial Conduct Authority's new Disclosure and Labels Advisory Group in November 2021.

Helping you
match sustainable
funds to client
preferences

Adviser Solutions



Fidelity
INTERNATIONAL

New functionality, more refined results

Originally launched in December 2021, the tool has recently been upgraded to include new functionality along with extra navigation aids for new users. You can now drill down to the issues clients feel most passionate about and select specific ethical, environmental, social and governance policies as part of the process. For example, you can search for funds that specifically avoid investing in the coal, oil and gas sectors or companies involved in the production of tobacco or alcohol.

In due course, a further update will be made to reflect the conclusion of the FCA's work on Sustainability Disclosure Requirements (SDR) and investment labels.

Preferences | 755 results available

Select your client's preferred investment approach (SRI Style)

Sustainability focused
 Environmentally focused
 Socially focused
 Ethically focused
 ESG weighted
 Limited exclusion
 Faith based

Advanced filters

Environmental Show descriptions

<input type="checkbox"/> Coal, oil and/or gas majors excluded	<input type="checkbox"/> Unsustainable/illegal deforestation exclusion policy
<input type="checkbox"/> Environmental damage and pollution policy	<input type="checkbox"/> Nuclear exclusion policy
<input type="checkbox"/> Net zero action plan from all/most companies required	<input type="checkbox"/> Invests in clean energy/renewables
<input type="checkbox"/> Biodiversity policy	<input type="checkbox"/> Plastics policy/reviewing plastics

Social and Governance Show descriptions

A quick and easy way to find sustainable funds

- 1 If you know the fund or manager you are looking for, you can type the fund name, key word or ISIN into the search function.

Select what you'd like to do

I want to search for funds using filters
Search sustainable fund list
 I know the fund I'm looking for
Find fund by typing fund name, key word or ISIN

Find fund

Start by typing fund name, key word or ISIN

- 2 Alternatively, you can conduct a more detailed search using the tool's filters. One option is to search for funds by 'SRI Style' or, in other words, your client's preferred approach to sustainable investing. Each fund is classified under one of seven SRI Styles.

Select what you'd like to do

I want to search for funds using filters
Search sustainable fund list
 I know the fund I'm looking for
Find fund by typing name, key word or ISIN

Select your client's preferred investment approach (SRI Style) [Definitions and tool information](#)

Sustainability focused
 Environmentally focused
 Socially focused
 Ethically focused
 ESG weighted
 Limited exclusion
 Faith based

[Advanced filters](#) | [Clear filters](#)

You can also search or refine your list by selecting certain issues the client feels strongly about. These are called **advanced filters**. You can also filter the list by selecting the approach taken – or policies adopted – by the fund manager. These include investing to deliver a positive impact or making a company-wide 'Net Zero' commitment. You can search by SRI Style and advanced filters independently or in combination.

Once you have defined your search criteria, you are presented with a list of funds that match your selections. A table of fund attributes is displayed alongside the list and you can also click through to each fund's factsheet. You can further refine the list at this stage by selecting additional filters, such as whether the funds are actively or passively managed or by the level of ongoing charges that apply to the funds. Your results can be downloaded as a PDF, which is also a new feature of the tool.

Why use the Sustainable Investment Finder?

- ✓ Finds potential fund solutions for clients who wish to invest sustainably in seconds
- ✓ Browse funds by category or search for a specific fund or manager
- ✓ Results, including fund characteristics, can be downloaded as a PDF
- ✓ Tool upgrades to reflect the evolving nature of ESG investing
- ✓ Developed along with SRI Services, a longstanding specialist in sustainable investment

For more on the Sustainable Investment Finder, as well as ESG perspectives and guides, visit our [sustainable investing hub](#)

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