

HORIZON SUSTAINABLE FUTURE TECHNOLOGIES

Enabling positive impact through innovation

Technology is the science of solving problems and its innovation is required for our world to meet the many challenges it faces. Investing in sustainable technologies provides investors with an avenue to drive positive change in not just environmental but also social issues. As the next generation of digital natives grow increasingly focused on sustainability, there are both significant and very broad investment opportunities within the sustainable technology sector.

Why this fund



Expertise managing the technology hype cycle

UK-based team of sector experts with over 80 years' combined industry experience navigating the hype cycle of technology



Positive impact technology themes

Positive screening of sustainable technology themes providing solutions to key global environmental and social challenges. Negative screening to avoid investing in companies with goods or services that contribute to environmental or societal harm.



Deep knowledge to identify underappreciated earnings power

Disciplined valuation approach seeks to identify underappreciated earnings power and rational growth at a reasonable price

A 5-level approach to a sustainability driven technology fund

	POSITIVE SCREENING	<ul style="list-style-type: none"> Applied via a positive thematic overlay of long term sustainable technology themes Aligned with UN SDGs 8 positive themes to guide idea generation
	NEGATIVE SCREENING	<ul style="list-style-type: none"> Country and company exclusions combined to reduce the investment universe by 20% Norms based screening ESG laggards
	BOTTOM-UP FUNDAMENTAL RESEARCH	<ul style="list-style-type: none"> Organic growth potential Competitive advantages Business model resilience Management quality Integrated ESG analysis
	VALUATION DISCIPLINE	<ul style="list-style-type: none"> Rational growth at a reasonable price Seeking underappreciated earnings growth potential Incorporate ESG insights
	ESG INSIGHTS & PROACTIVE ENGAGEMENT	<ul style="list-style-type: none"> Evaluate potential ESG issues Company engagement and progress reporting Utilise in house Governance and Responsible Investment team Dedicated experienced sustainability analyst

Portfolio management



Richard Clode, CFA

- Portfolio manager since 2014
- Industry since 2003



Alison Porter

- Portfolio manager since 2014
- Industry since 1995



Graeme Clark

- Portfolio manager since 2013
- Industry since 1994

Fund facts

Structure	SICAV
SFDR categorisation¹	Article 9
AUM	USD 25.12m (as at 31 March 2022)
Inception date	03 August 2021
Benchmark	MSCI ACWI IT Index
Performance target	The Fund aims to provide capital growth over the long term (5 years or more) by investing in technology-related companies that contribute to the development of a sustainable global economy.
Sector	Global Technology
Holdings range	40-70
Position size	Max 5%
Expected tracking error range²	4-10%
Expected active share	75%
Expected turnover	<50%
Base currency	USD

¹In accordance with the Sustainable Finance Disclosure Regulation, the Fund is classified as an Article 9 fund and has sustainability as its objective.

²based on rolling 3-year period.

Please note that these ranges are reflective of the portfolio managers' investment process and style at time of publication. They may not be hard limits and are subject to change without notice. Please refer to the Prospectus for the broader parameters within which the strategy may operate.

Role in a diversified portfolio

Portfolio position	 <div>Traditional Equity Global Technology</div>
Portfolio implementation	<ul style="list-style-type: none"> ▪ Complement traditional equity strategies
What this aims to offer investors	<ul style="list-style-type: none"> ▪ Long-term growth of capital ▪ Experienced team

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— INVESTORS —

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