



Fairstone Tribe invests in companies focused on solving global challenges, with a strong emphasis on sustainability, making it a solution for investors looking to align their portfolios with positive social and environmental outcomes

Fairstone Tribe is an actively managed, global multi-asset portfolio range with a sustainability overlay created by Fairstone, managed in partnership with Tribe Impact Capital. The portfolio's asset allocation and underlying holdings are guided by a top-down sustainability framework that naturally minimises exposures to controversial industries by focusing on the UN SDGs investments in sectors with negative impacts, such as those with high carbon emissions, and focuses on companies addressing global challenges.

## AT A GLANCE

**0.30%**

Investment Management Charge (IMC)  
(p.a)

**0.54 - 0.88%**

Ongoing Charges Figure (OCF)  
(p.a)\*

*We rebalance your investments quarterly to keep them aligned with your risk tolerance and goals*

*\*as of 23 May 2025*



## SUSTAINABILITY OVERLAY

The portfolio uses top-down industry and business activity screens combined with strict bottom-up inclusion criteria, ensuring investments contribute positively to environmental and social outcomes.

## IMPACT-TILTED INVESTMENTS

A portion of each portfolio, through the funds we invest in will always focus on companies that are solving global challenges, positioning them for future growth opportunities.

## DIVERSIFIED MULTI-ASSET PORTFOLIOS

The portfolios are well-diversified across asset classes, ensuring exposure to companies with strong sustainability credentials and long-term growth potential.

## EXPERTLY MANAGED BY TRIBE IMPACT CAPITAL

Tribe's experienced team has over 30 years of combined expertise in impact investing, sustainability, and portfolio management.



JAMIE  
INNES

AMY  
CLARKE

FRED  
KOOIJ

## MEET THE MANAGERS

Amy, Fred, and Jamie leverage deep expertise in sustainability, investment strategy, and research to drive Tribe Impact Capital's mission of delivering strong financial returns and positive impact. Amy has nearly 30 years of experience in corporate sustainability, having led teams at Bank of America, Microsoft, PwC, and EY. Fred oversees asset allocation, bringing over 20 years of experience from roles at JP Morgan, Credit Suisse, and BlueBay Asset Management. Jamie, with expertise in multi-asset management, leads Tribe's impact investment team, previously working at Schroders.

## EXPERTISE BEHIND THE PORTFOLIO

Fairstone Tribe's investment strategy is driven by Tribe Impact Capital's proven approach to sustainability and impact investing. The team uses a combination of top-down industry screening and bottom-up business selection criteria to ensure that the investments made

not only align with sustainability goals but also present strong growth opportunities. Tribe's deep experience in multi-asset portfolio construction ensures that investments are diversified across asset classes, offering long-term growth potential while contributing positively to societal and environmental change.

## WHAT THIS MEANS FOR YOU

### Outcomes Focused Investing

The portfolios target companies that offer strong sustainable business models, and in many cases are actively addressing global challenges.

### Sustainable Growth

Investments are carefully selected based on their sustainability credentials, ensuring alignment with both financial goals and environmental/social objectives.

### Tailored Solutions

The portfolio is designed to match your specific risk profile, ensuring that you remain within your comfort zone while supporting sustainable investing principles.

The scales below show where Fairstone Tribe fits in terms of investment strategy and geographic focus.

The investment strategy scale ranges from passive, following market indexes with lower fees, to active, making decisions to try and beat the market, with higher fees.

### INVESTMENT STRATEGY



Passive

Active

The geographic focus scale ranges from domestic, investing mainly in the UK, to global, investing in markets around the world, offering more diversity but also potentially higher risk.

### GEOGRAPHIC FOCUS



Domestic

Global

\*The value of investments, and the income from them, can go down as well as up and you may get back less than the amount invested.

### SCAN THE QR CODE

to access detailed fact sheets for our range of risk-rated options for Fairstone Tribe and discover how to tailor your investments.



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