

ESG – Improving the conversation

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RESEARCH HOUSE OF THE YEAR
Overall Winner

Powered by Money Management

2016 | 2017 | 2018 | 2019 | 2020



A photograph of a kangaroo in mid-leap across a dirt road. The road is light-colored and curves to the right. The background shows a grassy field and a line of trees under a bright sky.

ESG – Is it worth getting better at the conversation?

Lonsec

Australia's responsible investment market

- Reached a record **\$1.54 trillion in assets under management (AUM)**, now representing 43% of total professionally managed funds up from \$1.28 trillion in 2020
- AUM in **sustainability-themed** investing more than doubled to \$161 billion (from \$76 billion)
- **83% of Australians** expect their super to be **invested responsibly** and ethically, and 80% expect their savings to have a positive impact on the world
- **64% of Australians** expect their financial adviser to be knowledgeable about responsible investment options.
- **More than half (57%)** of these advisers have seen an **increase in client demand** for responsible investments over the last 12 months

Responsible Investment Association Australasia, From Values to Riches 2022: Charting consumer demand for responsible investing in Australia, 2022.
Responsible Investment Association Australasia, Responsible Investment Benchmark Report Australia 2022.
Investments Trends, Investment Trends 2022 ESG Adviser Report, May 2022

How do ESG conversations happen in your business?

01

Reactive**Client led**

Little or no defined process

- Questions
- Investment preferences

Inconsistent Solutions

02

Proactive**Adviser led**

Deeper conversation

- Values/goals
- Investment preferences

Defined process

- Questions
- Solutions

03

Strategic**Business led**

Promoted in CVP

Capturing a market

Specialist Advisers

Defined Process

Training

- Deeper ESG conversations

Critical Success Factors

Lonsec

01

Deeper understanding of a client's values, goals and investment preferences

02

Clear around your ESG value proposition

03

Choose an investment manager that supports and compliments your investment beliefs

04

Clear client engagement

05

Training your team

06

Understand the opportunity in your market





IMAP
MANAGED ACCOUNT
AWARD WINNER
ESG PORTFOLIO

Why Lonsec Sustainable Portfolio?

Lonsec

Delivering strong risk-adjusted returns and real-world impact

- ✓ A whole of portfolio, core multi-asset solution
- ✓ Aligned to the United Nations Sustainable Development Goals (UN SDG's)
- ✓ Best-of-breed managers incorporating ESG and Sustainability principles
- ✓ Avoids greenwashing by leveraging the depth and breadth of Lonsec Research
- ✓ Excludes/limits controversial industries misaligned to the UN SDGs
- ✓ Low Carbon footprint
- ✓ 57% FUM covered by Net Zero Commitments





Get in touch

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