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ESG and the role of the Adviser – Interactive session

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Dan Powell, Nanuk Asset Management

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ESG and the role of the Adviser (part 2)

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Strong performance over the past 10 years

Performance of responsible investment and mainstream funds

Australian share funds	1 Year	3 Years	5 Years	10 Years
Average responsible investment fund (between 17 and 34 funds sampled depending on time period)	-1.24%	5.70%	6.43%	12.39%
Morningstar: Australia Fund Equity Large Blend	-5.49%	4.87%	4.42%	7.95%
S&P/ASX 300 Total Return	-3.06%	6.65%	5.60%	8.91%

International share funds	1 Year	3 Years	5 Years	10 Years
Average responsible investment fund (between 7 and 38 funds sampled depending on time period)	-0.03%	11.18%	9.48%	9.50%
Morningstar: Equity World Large Blend	-0.68%	6.37%	8.42%	8.97%
MSCI World Ex Australia NR AUD	1.52%	7.49%	9.81%	9.57%

Multi-sector growth funds	1 Year	3 Years	5 Years	10 Years
Average responsible investment fund (7 funds)	-1.13%	4.75%	5.65%	7.66%
Australia Fund Multisector Growth	-2.26%	4.39%	4.92%	7.02%

■ Outperformed by the average RI fund ■ Underperformed by the average RI fund

For more information, refer:

www.responsibleinvestment.org

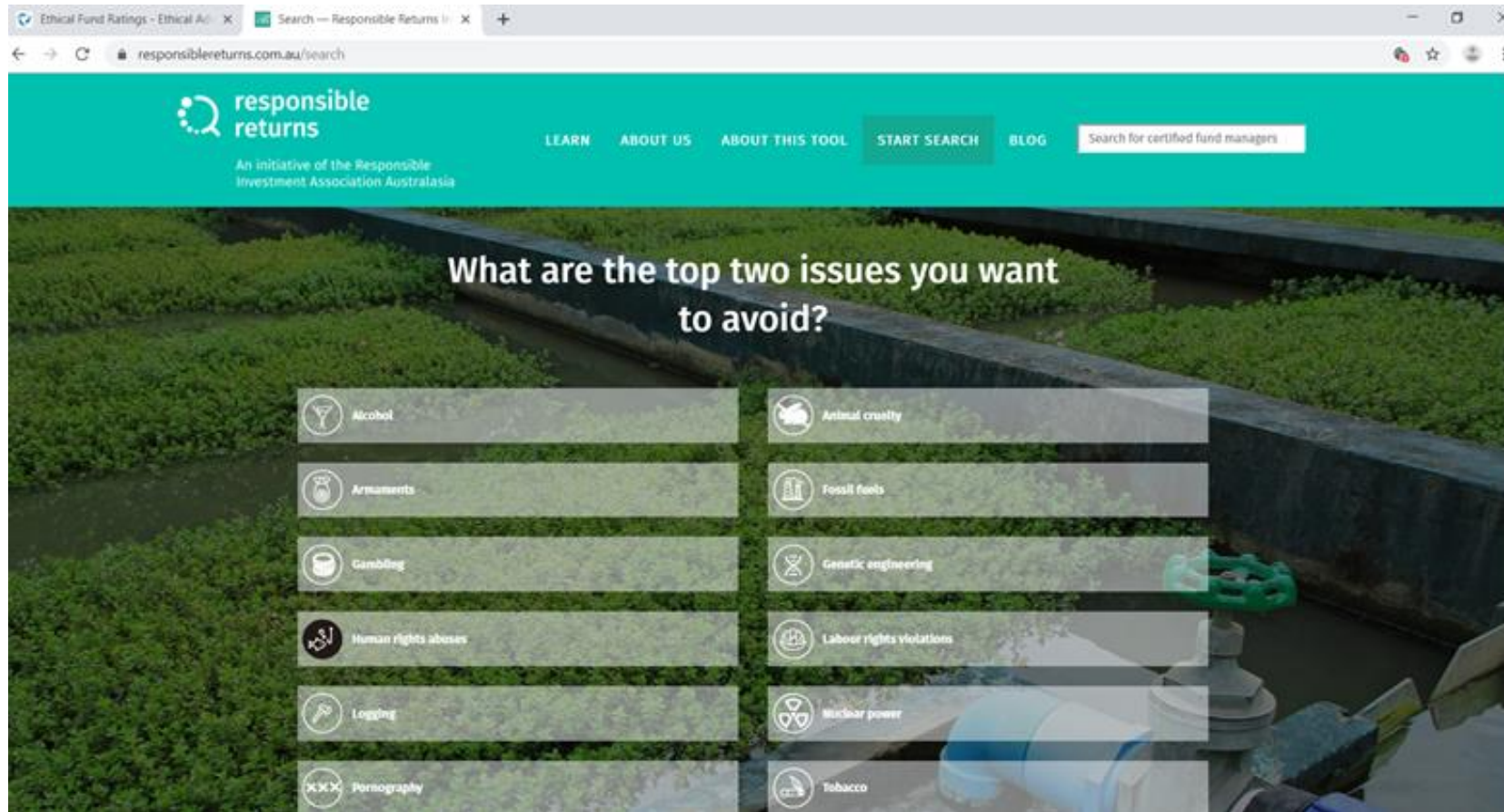
Past performance is not an indicator of future performance.



Responsible Investment Association Australasia
Responsible Investment Benchmark Report 2019 Australia

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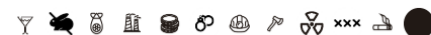
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Pengana Capital

Inclusions



Some level of screening



Investment Approaches

- Sustainability themed
- Negative Screening
- Impact investing
- ESG Integration

5 matching products

- [Pengana WHEB Sustainable Impact Fund](#)
- [Pengana International Equities Limited \(ASX: PIA\)](#)
- [Pengana High Conviction Equities Fund](#)
- [Pengana International Fund - Ethical Opportunity](#)
- [Pengana International Fund - Ethical](#)

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Pengana WHEB Sustainable Impact Fund

A fund investing in companies with activities providing **solutions** to **sustainability challenges**.

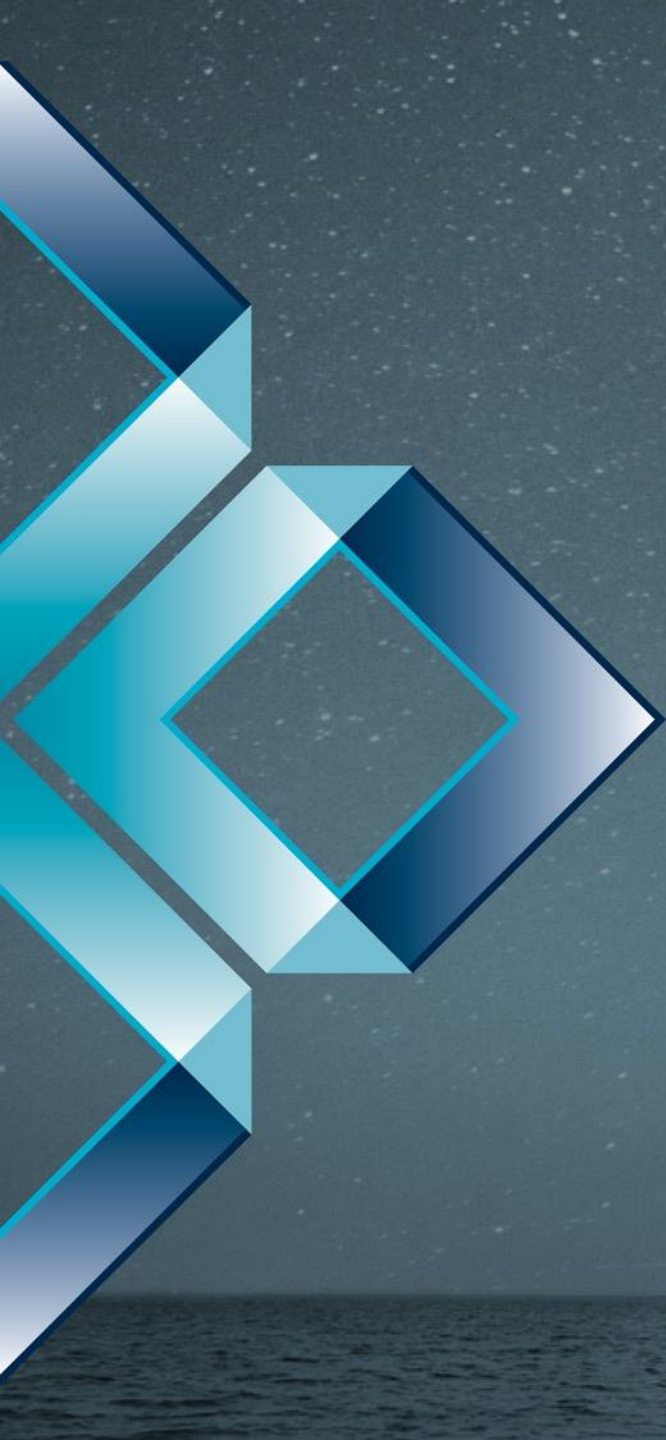


Client Orientation

- How many advice clients raise ESG issues with their adviser?
 - How central are ESG considerations to them and how many clients make an ESG approach mandatory in their portfolios?
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- Which issues do clients most want to address in their investment portfolios? As a result, do you take a whole of portfolio approach or only equities? What is rate of development here?
 - Investment products vary widely in their approach to ESG issues, even those which are labelled as such. How to you explain or reconcile this for clients and what impact does it have on portfolio construction ? Do clients expect negative screens only or are they interested in positive screens/impact investing and/or asset stewardship. What is rate of development here?
 - How quickly are expectations rising among clients?

Adviser Orientation

- How do you discuss the issues clients raise? Is it something you typically initiate or do you wait for those clients for whom it's important to raise it?
- To what extent do your own beliefs influence the way you address product selection and portfolio construction?
- What information would make it easier for you to provide advice that takes ESG considerations into account? Who should provide this?
- In your practice what are the principal drivers of any ESG perspective - client lead, performance lead, regulation lead or adviser lead?



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Discussion

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