

Questions to ask a ‘sustainable’ fund manager

Get an understanding of a fund manager’s approach to sustainable investment by asking some questions such as these (you can of course prepare your own questions instead):

1. What is the size of your sustainable investment team?
2. What percentage of your assets under management do you invest sustainably?
3. What methodology do you use to ensure a fund is sustainable?
4. Do you invest sustainably to manage financial risk only or do you have a policy to help achieve Sustainable Development Goals
5. Where do you source your company data?
6. Are your funds aligned with the ‘Paris Agreement’ and the UK’s net zero by 2050 target?
7. Have you signed the UK Stewardship Code?
8. Are you a member of an investor initiative such as The Investor Agenda, Climate Action 100+ or the Science Based Targets Initiative?