**Berenberg Sustainable Multi Asset Dynamic Fund**

**ESG Investing Award Submission for Best ESG Investment Fund: Multi-Asset**

The **Berenberg Sustainable Multi Asset Dynamic**1 is underpinned by the belief that long term value creation goes hand-in-hand with business models and management teams who strive to contribute positively to sustainable structural trends.

Four global challenges sit at heart of our impact framework:

(i) Demography & Health;

(ii) Climate Change;

(iii) Sustainable Growth & Innovation;

(iv) Responsible Use of Resources.

Every portfolio holding undergoes in-depth impact analysis designed to assess the contribution to these challenges.

Beyond the **positive environmental and social impact of its portfolio holdings** and **its clear investment philosophy**1, the Fund could be considered best in class for the following reasons:

* **Innovation** – **Berenberg Net Impact Model**. This evolving innovative, proprietary model is used to holistically assess the positive *and* negative impact of our holdings, a key differentiating feature. The model is adjusted for fixed income investments to adequately capture their characteristics.2
* **Small and mid-caps expertise** – small and mid-cap investing is a strength of Berenberg. Less research coverage results in smaller companies tending to have poorer ESG ratings. Often, these companies provide innovative solutions that address global challenges. Investors in the Fund benefit from exposure to outstanding and impactful smaller companies that typically don’t feature in the portfolios of our peers. 3
* **Unparalleled transparency** – Impact reports have become common-place. However, the Fund’s annual Impact Report is uncommon by the degree of transparency it provides on the investment process, particularly the Net Impact Model. This degree of transparency (beyond outcomes) is what clients often tell us they are missing from many other asset managers.
* **Collaboration and knowledge transfer** – Establishing the four structural trends was a result not only of internal thought and research but also thoughtful engagement and collaboration with the wider investor community by means of ESG surveys.4 The survey results have valuable investment application.

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*Attachments*

*1 – Please find a summary Fund presentation attached*

*2 – Please find attached our Impact Report 2022*

*3 – Please find attached our thought-leadership on addressing ESG challenges in the small and mid-caps.*

*4 – Please find attached our most recent ESG Survey 2022*