

Product identifier: 637813

2 December 2024

Columbia Threadneedle Fund Management Limited

# CT Responsible Global Equity Fund

## Sustainability approach

Our sustainability approach embeds an “**Avoid, Invest, Improve**” philosophy into the Fund’s investment policy:

### Avoid:

Every company considered for investment is first screened against exclusion criteria to avoid companies:

- **involved in providing activities that harm society or the environment**, including alcohol and tobacco production, deforestation, fossil fuels, weapons, gambling, nuclear energy, pornography.
- **that fail to address the key ethical, environmental, social and governance (ESG) impacts of their business** relating to, for example, human rights, labour standards, biodiversity loss, animal testing and welfare.
- **that breach international standards of business conduct** such as the United Nations Global Compact.

Full exclusion criteria, and any applicable revenue thresholds or exceptions, can be found on our [website](#) and are reviewed and updated annually.

### Invest:

- We invest predominantly in companies making a positive contribution to society and/or the environment through products and services that provide solutions to real-world sustainability challenges (such as renewable energy providers to support the mitigation of climate change). We consider whether companies are making a material contribution to the Fund’s key sustainability themes, which include energy transition, and health and wellbeing.
- Our Responsible Investment team conducts in-depth research into every company considered for inclusion in the Fund to ensure that each company meets high standards in how they operate and how they manage sustainability issues.

### Improve:

- We seek to engage with companies held in the Fund to improve their management of significant ESG issues identified, as part of our firm-wide engagement programme. We believe this should ultimately support long-term performance, reduce risk, and contribute to promoting a fairer and more sustainable world.

## Independent review

An independent Responsible Investment Advisory Council, made up of external responsible investment experts, provides us with advice on our approach, the development of our exclusion criteria, and reviews and challenges screening decisions.

## Net Zero Asset Managers Initiative (NZAMI)

As a member of the Net Zero Asset Managers Initiative, the Fund has committed to an ambition to reach net zero emissions by 2050 or sooner. Our focus is on real-world decarbonisation, using stewardship to encourage companies to align to a net zero future.



### Company assessment

- > We rate companies in their alignment to a net zero pathway, using an internal tool.
- > We aim for companies representing >70% of portfolio emissions to be either rated as “aligned” to net zero, or under engagement.



### Net zero stewardship

- > We engage with laggard or high-impact companies on climate objectives, seeking to encourage improvement.
- > We sell when minimum expectations are not met.



### Portfolio assessment

- > We compare the fund’s carbon emissions with net zero-aligned trajectory.
- > We use the benchmark emissions in 2019 and apply a 50% reduction by 2030.
- > This is a reference pathway to track progress, not a binding target.



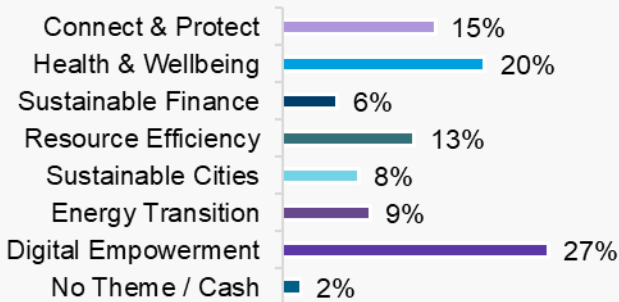
### Coal exclusions

- > Companies with >30% revenues from coal or investing in new coal infrastructure.

## Sustainability metrics

Below is a summary of the metrics we use to measure the sustainability characteristics of the fund:

### Portfolio aligned to each sustainability theme



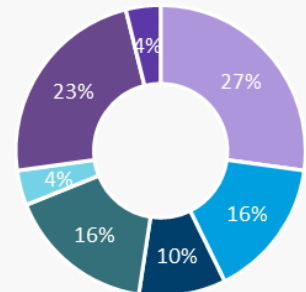
### Net zero

In our next report, we will publish relevant metrics showing progress towards the Fund’s net zero ambition.

### Annual engagement summary

**Engagements** 43  
**Companies Engaged** 26

- Climate Change
- Environmental Stewardship
- Human Rights
- Labour Standards
- Public Health
- Corporate Governance
- Business Conduct



### Exclusion criteria

We can confirm that no investments were made in companies that breach the exclusion criteria during the reporting period.

Produced by Columbia Threadneedle Investments as at 30 September 2024. The information in this document is provided to you for information purposes, is subject to change without notice and is not indicative of future portfolio characteristics. Third party data may be subject to limitations in respect of its accuracy and / or completeness.

## More information:

The Prospectus (which contains more information about this Fund), together with the Key Investor Information Document (KIID) can be found on our website: [Link](#)

Other information about the Fund can be found, including information about available share classes and the fees and charges associated with investing: [Link](#)

To find out more visit [columbiathreadneedle.com](https://columbiathreadneedle.com)

