



Heartwood  
Investment Management

## Press Release

# Heartwood Investment Management launches two new ethical global multi asset strategies

Heartwood Investment Management today announces that it has launched two new ethical multi asset investment strategies. The Ethical Balanced and Ethical Growth strategies have risk / return profiles that are aligned with Heartwood's long standing total return Balanced and Growth investment strategies, but are implemented using investments that meet appropriate ethical criteria.

The ethical strategies have been designed with an integrated approach, incorporating both negative screening to avoid exposure to socially harmful activities, and a positive overlay to create tilt towards investments with a clear social or environmental benefit. The portfolios are specifically screened to exclude exposure to tobacco, weapons manufacturing, gambling, alcohol and pornography.

The ethical strategies will be managed by Benjamin Matthews, and in common with all Heartwood's global multi asset strategies will benefit from the investment team's collective approach to strategic asset allocation, tactical asset allocation and risk management.

**Noland Carter, Head of Heartwood Investment Management**, said: "Clients across the board are increasingly looking to have portfolios managed in a way that is aligned with their values and ethical concerns. With these globally diversified ethical strategies, clients will benefit from Heartwood's expertise in building and managing multi asset portfolios, but will also be able to ensure their investments have a positive social impact. We believe this approach is attractive to a wide range of private investors, charities, trusts and institutions."

**Matt Hollier, Head of Investment Product at Heartwood Investment Management** commented: "Heartwood has wanted to offer ethical investment options to our clients for a significant period and have conducted substantial research in this area. Our belief is that we are now at a point where there is a sufficient range of high quality ethical investment instruments such that we can build high quality global multi asset portfolios that can deliver appropriate returns to our clients."

For further information on Heartwood Investment Management, please visit [www.heartwoodgroup.co.uk](http://www.heartwoodgroup.co.uk)

**ENDS**

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#### Notes to Editors – Important information

Heartwood Investment Management is a division of Heartwood Wealth Management Ltd (Heartwood) which is authorised and regulated by the Financial Conduct Authority (FCA) in the conduct of investment business, and is a wholly owned subsidiary of Svenska Handelsbanken AB (publ).

Heartwood Investment Management (HIM) provides investment management services for individuals, financial advisers and charities. Heartwood currently has over £2.5 billion of assets under management and administration as at 30 June 2016. Nothing in this press release constitutes advice to undertake a transaction and professional advice should be taken before investing. Past performance should not be seen as a reliable indicator of future results. The value of investments may fall as well as rise.

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