



Heartwood Investment Management launches a full range of sustainable investment solutions

Heartwood Investment Management, the asset management arm of Handelsbanken in the UK, today launches a full range of multi asset sustainable investment solutions covering a range of target returns according to increasing levels of risk tolerance. The aim is to provide investors with access to a sustainable product at all points on the risk/return curve.

The four strategies are globally diversified portfolios which benefit from the tried and trusted investment approach of Heartwood's unconstrained multi asset strategies. We launched the Balanced Sustainable and Growth Sustainable strategies two years' ago; these have performed as we hoped and we are now adding Defensive Sustainable and Cautious Sustainable to complete the range.

Each sustainable strategy aims to deliver a defined return over inflation and is run to a specific benchmark target (CPI plus) that is aligned to its risk profile. The strategies aim to achieve or outperform these targets over a rolling five-year period net of fees.

The strategies are managed by Benjamin Matthews, who has been running the original portfolios for two years using an active approach which screens potential investments against positive and negative sustainable criteria. These portfolios have successfully delivered a return and risk profile in line with their corresponding unconstrained total return strategies over that period.

Benjamin says, "Achieving a positive impact on social or environmental outcomes combined with the delivery of compelling financial returns is at the heart of sustainable investing. It means finding investments that can deliver those positive outcomes, while at the same time excluding those that could do harm or are ethically unpalatable. We believe our multi asset sustainable strategies provide investors with the solutions they need to meet their risk/return objectives through sustainable investing."

Noland Carter, Head of Heartwood Investment Management and Chief Investment Officer, commented, "We are excited to complete the range of our multi asset sustainable strategies, building on and developing our experience in the sustainable space. They are a natural extension of our core product range and reflect a growing demand from our investor base. With these strategies, I believe we at Heartwood have set ourselves apart by delivering sustainable solutions to meet the needs of existing and future investors."

Heartwood Investment Management is a global multi-asset investment manager for private, institutional and charity clients as well as external intermediary firms. Heartwood offers a range of investment strategies intended to suit various return objectives and levels of risk tolerance. Its straightforward investment proposition is designed to optimise the expertise of a high calibre, experienced team of professionals to benefit clients with portfolios of all sizes.

For further information on Heartwood Investment Management, please visit www.heartwoodgroup.co.uk

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Notes to Editors – Important information

Heartwood Investment Management is a division of Heartwood Wealth Management Ltd 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 provides investment management services for individuals, financial advisers and charities. Heartwood currently has over £3.4 billion of assets under management and administration as at 31 December 2017. 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.