

ebi launches index-tracking impact MPS range

ebi, the award-winning discretionary fund manager, today unveils a new index-tracking impact portfolio range designed to generate positive real-world environmental and social outcomes.

The Impact portfolio suite is a set of low-cost model portfolios designed for investors seeking a globally diversified impact solution. The Impact portfolios invest in a range of index-tracking impact equity ETFs designed to cover the investible criteria set by the EU taxonomy for sustainable activities, and a Global Green Bond solution. All funds used in the portfolios are classified as Article 9 under the EU's Sustainable Finance Disclosure Regulation.

The Impact equity portfolio invests in a range of cutting-edge global impact equity ETFs managed by Rize ETF, which track a range of impact-focused indices. Rize ETF is Europe's first specialist thematic ETF issuer, and recently became part of the leading global investment manager ARK Invest. Its philosophy focuses on providing investors with unprecedented access to innovation, sustainability solutions, and megatrends that are positively shaping our world.

The Impact bond portfolio invests in a Global Green Bond solution managed by industry leader Northern Trust, which tracks the Bloomberg MSCI Global Green Bond Index. It invests in fixed income securities in which the proceeds are applied to projects and activities that promote climate or environmental sustainability.

The Impact range includes eleven portfolios, designed for different risk profiles, ranging from 100% bond / 0% equity to 0% bond / 100% equity allocations. With total portfolio underlying fund ongoing charges between 0.13% to 0.52%, and a discretionary investment management fee of 0.12%, the portfolios are a competitive low-cost new entrant in the impact model portfolio space.

ebi's Investment Product Manager, Jonathan Griffiths, CFA, commented: "We are pleased to unveil the latest addition to ebi's portfolio line-up: the Impact portfolio suite. Investing exclusively in Article 9 funds under the EU's Sustainable Finance Disclosure Regulation, these portfolios provide an exciting new offering for clients seeking to generate positive, measurable, and sustainable social and environmental change, alongside a financial return."

ebi celebrated hitting the milestone of £3bn in assets under management (AUM) in July 2024. ebi became part of Bristol-based platform Parmenion in 2022.

Press Release

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For further information please contact:

Pippa Russell

+44 (0) 7740933120

pippa@russellcommunications.co.uk

Notes to Editors

Founded in 2010, ebi's sustained growth is driven by an innovative investment proposition in conjunction with an award winning technology suite.

Offering a range of passively managed investment products, ebi has particular expertise in sustainable and factor model portfolios.

ebi strives to be at the forefront of ESG investing. Observing a lack of low-cost, diversified, passive, systematic ESG investment solutions in the marketplace – rather than waiting for such products to become available, it collaborated with leading sustainable investment managers to introduce cutting-edge sustainable investment solutions that are fair, robust, and transparent for end-clients.

Launched by an IFA, ebi understands the requirements of advisers in supporting their clients. Its award winning technology helps facilitate client conversations, mitigate risk and supporting advisers and their business.

Acquired by Parmenion in 2022, ebi continues to operate independently, but with the support and resources to help it achieve its ambitious growth plans.

To learn more, [visit ebi.co.uk](https://www.ebi.co.uk).