The Aon Global Impact Fund
Investing for the future
More than ever before, the world needs investments that make a positive impact. Impact investing plays an increasingly important role in the transition to a fairer and more sustainable world.

The Aon Global Impact Fund invests in a range of listed companies working towards providing prosperity for economies, society and our planet.
Investing to drive change

Making a positive impact on people and the planet, while also generating healthy returns

Positive change: a global call to action

The world faces many social and environmental challenges; climate change, poverty, pollution, income inequalities and more. Increasingly, investors are looking for ways to tackle these problems through their investment choices. This is where Impact investing comes in. By investing in companies making a real difference, investors can support humanity’s collective effort to achieve the United Nation’s Sustainable Development Goals (SDGs).
The Aon Global Impact Fund

A single fund investing in multiple strategies addressing a range of impact themes that contribute to the transition to a more sustainable economy.

Fund objective

To generate capital growth over the long term while generating positive impact on society through:

- active investments in global companies whose business products or services are addressing the planet’s long-term challenges
- investing funds where the manager engages with portfolio companies to encourage business improvement regarding environmental, social or governance issues

Fund strategy

An actively managed long-only fund-of-funds, all-cap equity strategy investing in a blend of Aon buy-rated managers.

Our approach

- Unconstrained: Focused on the very best companies, not constrained by geography / sector
- Best ideas: Invests in the best ideas, strategies and managers from Aon’s buy-rated list
- Measurable impact: A clear vision of how capital invested is contributing towards society and the planet

Simulated Fund performance

Source: Aon, eVestment. Simulated performance inception: February 2017. Benchmark: MSCI World-ND. Please note that the past performance returns have been simulated and that these returns have not been achieved. The simulation uses monthly returns and assumes annual calendar year rebalancing. The impact of fees and expenses is not included in the calculation. The effect of all fees and expenses is estimated to detract 80bps per annum from gross performance, assuming a notional strategy size of £200m. Past performance is not a reliable indicator of future performance.

1 In the opinion of the underlying manager
2 Sector allocation excludes tobacco stocks
The SDGs and impact

A framework for delivering sustainable outcomes

The United Nations Sustainable Development Goals (SDGs) serve as a blueprint for positively transforming the world in which we live, by ending poverty, safeguarding the planet and ensuring prosperity for all by 2030. The SDGs recognise the international and interconnected nature of social and environmental challenges alongside providing a useful framework against which to measure the impact an investment may have in relation to the achievement of the SDGs.

Positions in the Aon Global Impact Fund align with the UN Sustainable Development Goals to illustrate the connection between portfolio exposure and broadening global prosperity.

Positive and measurable impact

Portfolio companies operate across a range of sectors and regions to deliver financial returns and sustainable future growth. Portfolio companies contribute to solutions across a broad spectrum of social and environmental challenges or are aligned with the sustainable transition. Typical areas of investment focus include:

- **Environment**: Focuses on energy conservation and climate change by investing in companies that promote clean, renewable energy and efficient water infrastructure as well as production of sustainable food.
- **Social**: Focuses on companies advancing and improving accessibility of health and wellbeing solutions, providing housing affordability to improve quality of life, providing education opportunities for all and promoting financial services to underserved populations to foster economic growth and inclusion.

Positive impact themes

- **Health & wellbeing**
- **Water**
- **Affordable housing**
- **Education**
- **Green buildings**
- **Energy efficiency**
- **Renewable energy**
- **Sustainable forestry**

\(^1\) In the opinion of the underlying manager
Contribution of the Fund by revenue or products and services to the SDGs

Source: Aon, un.org.
Contributing to positive outcomes

The real world effects of your investments
Portfolio companies are delivering solutions to environmental and social challenges.

Driving climate action with clean energy

ØRSTED
Ørsted aims to be the world’s first green energy supermajor, creating a world that runs entirely on green energy. Ørsted’s green energy solutions have seen:

- **73%** Reduction in coal
- **11.3m** Tonnes of carbon emissions avoided

Providing clean water and tackling water scarcity

ECOLAB
Ecolab products and services aim to improve water quality, reduce energy usage and waste water have seen:

- **171bn** Gallons of water conserved
  Equivalent to annual drinking water needs of 590 million people

Improving healthcare and quality of life

GILEAD SCIENCES
Gilead Sciences, a biopharmaceutical company develops therapies to treat illnesses such as HIV/AIDs and Hepatitis. Gilead’s products have seen:

- **12.5m** People with HIV on Gilead’s treatment

Addressing poverty through financial inclusion

SAFARICOM
Safaricom, a Kenyan telecommunications company offer a mobile money transfer and financing service. Safaricom’s service has allowed:

- **20m** People in Kenya to access mobile services

Why Aon?

We believe Aon’s extensive expertise and resource in equity research and responsible investing, combined with an active approach to impact investing can deliver sustainable, long-term returns while building a sustainable future.

Reasons to invest

- **Achieve results**
  Invest for a better future whilst achieving competitive equity returns

- **Investing for impact**
  Companies held in the portfolio are positively impacting the environment and/or society

- **Future-proof**
  Future-proof your portfolio in an evolving market landscape

Global team

- **19 equity research specialists**
- **15 responsible investing experts**

Our partners

- [University of Cambridge Institute for Sustainability Leadership](#)
- [SASB Alliance](#)
- [PRI Principles for Responsible Investment](#)
Contact

To talk to us about our Global Impact Fund or about any of the information in this document, please get in touch with your Aon consultant or contact us on the details below:

**Tim Manuel**  
+44 (0)1132 915 038  
timothy.manuel@aon.com

**Geri McMahon**  
+44 (0)20 7086 1036  
geri.mcmahon@aon.com
About Aon
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