

An introduction to Tribe Impact Capital

FOR FINANCIAL ADVISERS

WHO IS TRIBE?

Tribe is the UK's first dedicated Impact Wealth Manager, offering discretionary and advisory portfolio management to individuals and charities, as well as a model portfolio service (SIMPS) to selected financial advisers and their clients. Authorised through the FCA Innovation Hub in 2016, Tribe was created in response to a significant increase in demand from wealth holders wanting their invested wealth to provide sustainable impact alongside financial return.

We work in partnership with clients and their advisers to gain a deeper understanding of their values and how these align with the UN Sustainable Development Goal (SDG) framework. We go beyond traditional negative screens, focusing solely on the positive selection of responsible,

sustainable and impactful investments.

In 2019, we celebrated three years of running active portfolios. Whilst past performance is not a good indicator of the future, we believe the performance of our **SIMPS PORTFOLIOS** to date ([latest factsheets](#)), highlights both the strength of our investment process and that impact investing can deliver strong risk-adjusted performance.

Tribe is a proud certified B Corp which means everything we do balances purpose and profit. As part of our commitment to achieving positive change, we have locked into our mission and model 20% of our profits to invest in high impact, scalable, mission-driven organisations.

We don't provide financial planning or pensions advice.

OUR KEY COMMITMENTS

We have declared a [climate emergency and #NetZero2025](#) target because we believe business can be, and should be, a force for positive change.

We are signatories of the UN Principles for Responsible Investing and the UN Environment Programme Finance Initiative, as well as HM Treasury's Women in Finance, Science Based Targets and the Principles of Positive Impact Finance.



WHAT ARE THE SIMPS PORTFOLIOS?

The **SIMPS PORTFOLIO** range has been designed specifically for advisers who wish to provide their clients with combines risk-adjusted returns and positive impact. The portfolios aim to achieve capital appreciation whilst reducing investment risk via a diversified, multi-asset class portfolio. The strategy is based on actively managed asset allocations across equities, fixed income and cash. We invest in funds which align with our investment philosophy; businesses that avoid controversies, are well run and solving major challenges.

WHAT DO THE SIMPS PORTFOLIOS DO?



DELIVER FINANCIAL RETURNS:

We have a stringent investment due diligence process when selecting managers, which we combine with thoughtful and disciplined asset allocation.



DELIVER SOCIAL AND ENVIRONMENTAL BENEFITS:

Managers are chosen for both their investment approach and how they think about and achieve sustainability and impact.



GOOD INVESTMENTS AND POSITIVE IMPACT

HOW DO THE SIMPS PORTFOLIOS RELATE TO THE UN SDGS?

The UN SDGs guide our investments enabling advisers and their clients who invest in a SIMPS PORTFOLIO to identify the impact of the portfolio on the world. To facilitate this, we have aggregated the 17 SDGs into our four Impact Themes. We harness the interconnectivity of the Goals to create the SIMPS PORTFOLIOS. For percentage breakdowns of Impact Themes within our range of SIMPS PORTFOLIOS view [latest factsheets](#).



Tribe Theme 1 focuses on the boundaries that Nature sets; the ecological ceiling or planetary boundaries.




Tribe Theme 3 focuses on the economic and physical infrastructure needed to deliver Tribe Theme 2 whilst respecting Tribe Theme 1; the fabric for delivery of the goals.




Tribe Theme 2 focuses on the social fabric needed to ensure everyone thrives; the social foundation.




Tribe Theme 4 focuses on the political, cultural and legal systems and behaviours needed to drive the change required; the behavioural shift needed to succeed.



SOME RECOGNITION



BEST SUSTAINABLE WM/DFM GROUP

Tribe Impact Capital LLP

The Conduit
40 Conduit Street
London, W1S 2YQ
+44 (0)203 745 5570
advisers@tribeimpactcapital.com



IMPORTANT INFORMATION This factsheet is marketing material for use by Financial Advisers and clients and prospects of the Financial Adviser. It should not be reproduced, copied or made available to anyone else. The information in this factsheet is for illustrative purposes only and does not provide sufficient information on which to make an informed investment decision. This factsheet is not intended and should not be construed as an offer, solicitation or recommendation by Tribe to buy or sell any specific investments or participate in any investment (or other) strategy. Any potential investors must seek advice concerning the suitability of any investment in the SIMPS from their Financial Adviser. **Please note: (i) past performance is not an indication of**

future performance and the value of investments and the income derived from them may fluctuate and you may not receive back the amount you originally invested and (ii) any type of impact investment will involve risk to investors capital and the expected impact or financial return may not be achieved. The tax treatment of investments depends on each investor's individual circumstances and is subject to change in tax legislation. The performance of actual portfolios linked to this SIMPS PORTFOLIO may differ from the performance of the SIMPS PORTFOLIO shown here due to the variation in timing of the initial investment or rebalancing differences resulting from minimum transaction size limits on the investment platform.

The information in this factsheet is believed to be correct but we cannot guarantee this. No representation or warranty (express or otherwise) is given as to the accuracy or completeness of the information contained in this factsheet and Tribe Impact Capital LLP ("Tribe") and its partners and employees accept no liability for the consequences of your acting upon the information contained in this factsheet. Authorised and regulated by the FCA (number 756411). Companies House: (OC411984).