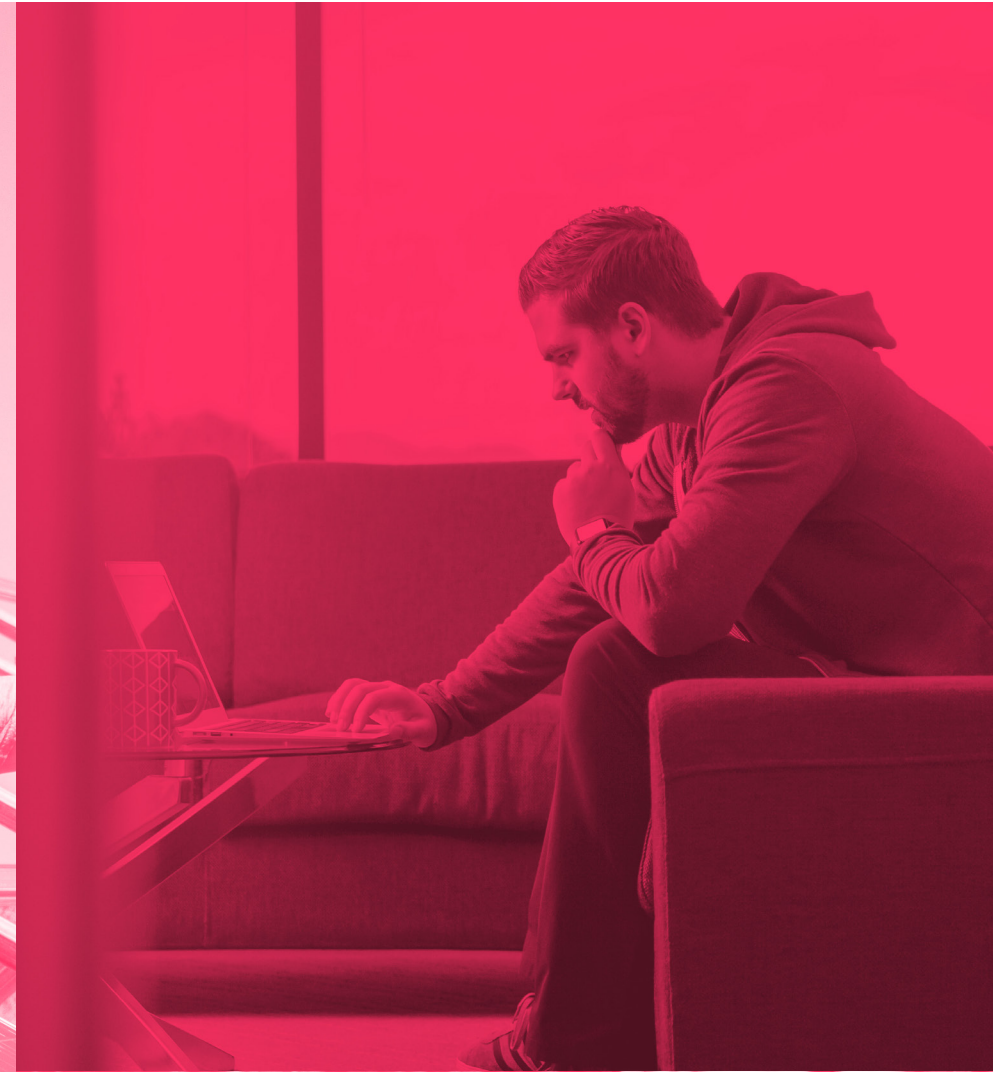


Tribe | **IMPACT CAPITAL**



Realise your wealth potential

What if your wealth actually
reflected your values?

Meet the wealth managers who
share your commitment to
reshaping the world for the better.

While we
can't **determine**
the future, as humans
we're **driven**
to shape it.

Wealth management seeks to deliver this through financial security - for ourselves and our families. **What if it didn't stop there?**

Many of us want to **use our wealth to do more**: to put it to work in a way that will help bring about prosperity for others, and for the planet.



The true meaning of wealth has been lost, reduced to being only about financial return at the expense of everything else

- be that **personal, **social** or **environmental.****

Many investors feel disconnected from their wealth, not knowing how the companies they invest in behave.

Beyond ruling out companies that are the worst offenders, investors are rarely given the tools to **quantify the impact** their investments are having on society and the environment.

The reality is that companies solving global challenges are **improved, future-fit businesses.**

Why is this?



INCREASED RESOURCE EFFICIENCY

Companies who care about their impact are likely to be more efficient in their use of energy and natural capital.



REGULATION RESILIENCE

Sustainable businesses are more likely to gain competitive advantage over those hampered by new incoming climate regulation.



INCREASING CONSUMER DEMAND

Companies providing sustainable services, such as green energy and sustainable mobility, are more likely to thrive as consumers drive demand.

We're changing wealth management... for good.

Join a growing community of people demanding that their wealth goes further.

- 1 Invest in companies that represent what you care about.
- 2 Make a positive impact on the world alongside financial returns.
- 3 Create a more purposeful legacy.

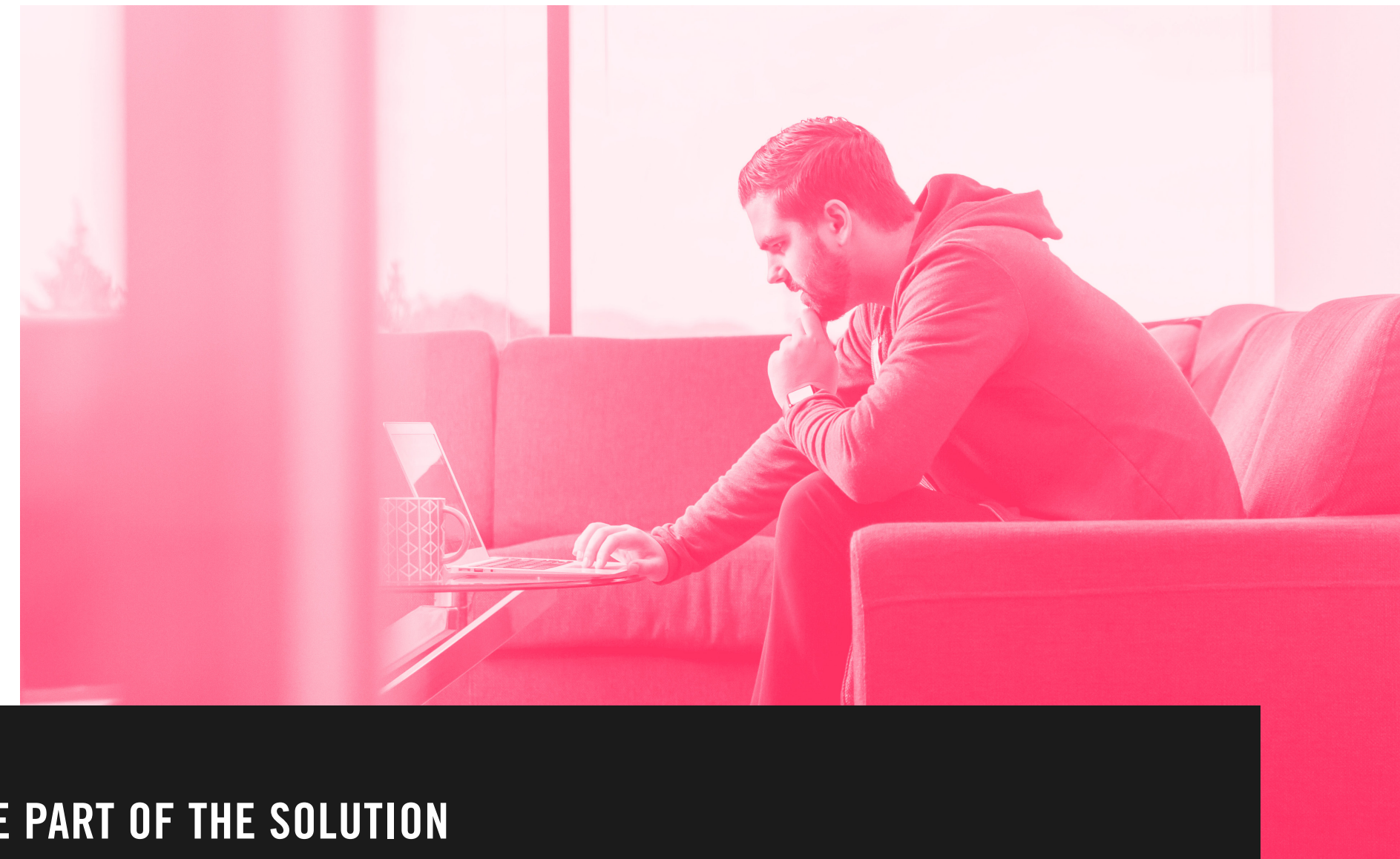
How does it **work**?

Your invested capital can create the **change you want to see** in the world.



INVEST IN A PURPOSEFUL PORTFOLIO

With your financial adviser, choose a SIMPS portfolio that gives you financial, social and environmental returns.



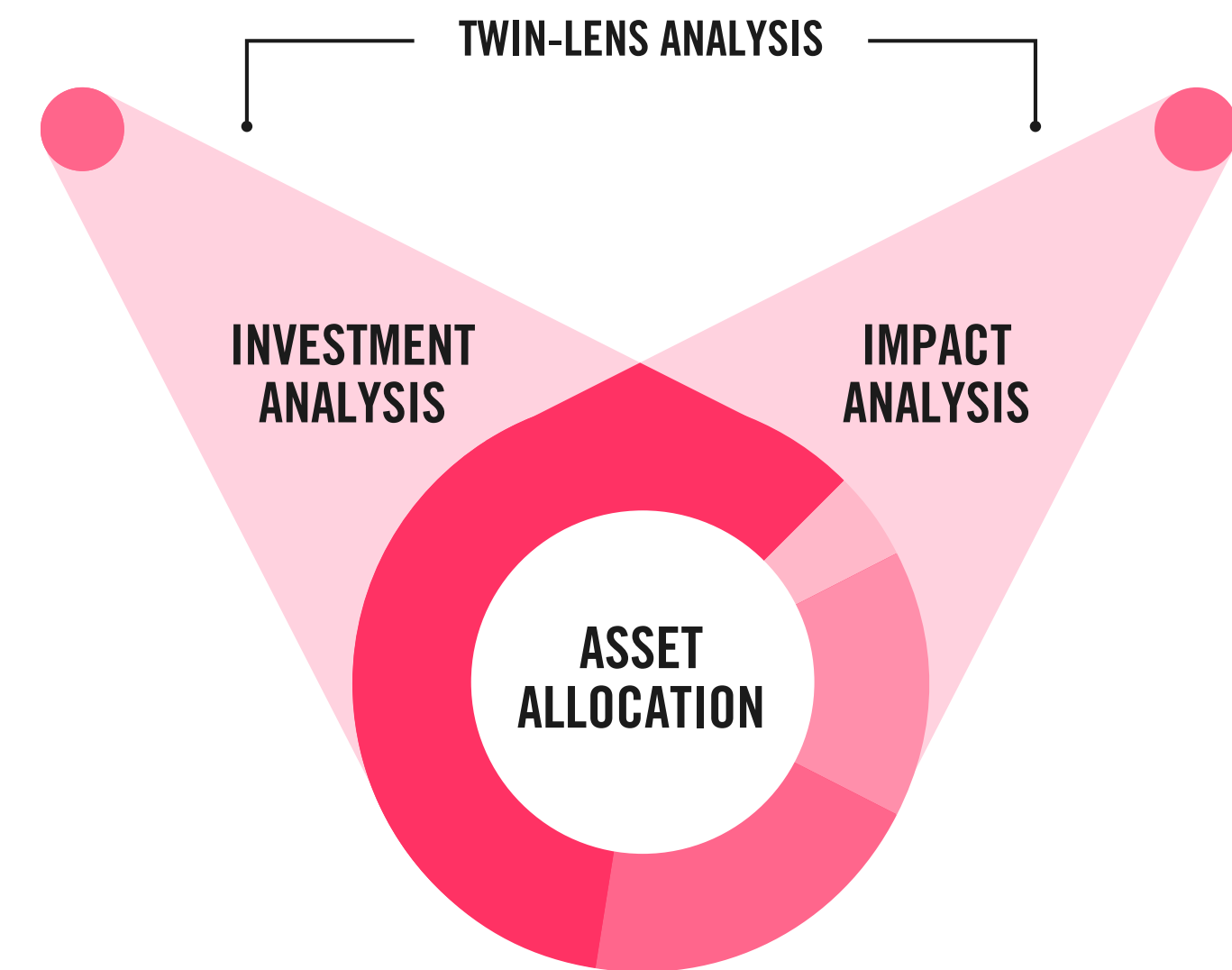
BE PART OF THE SOLUTION

Discover the impacts your portfolio is having through the SIMPS impact and financial performance reporting.

Invest in a purposeful portfolio



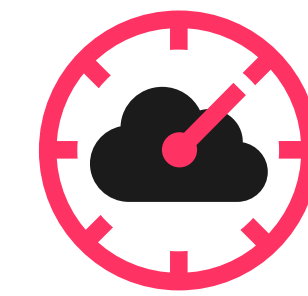
Your SIMPS portfolio is aligned to the SDGs allowing you to **identify the impact** you're creating in the world.



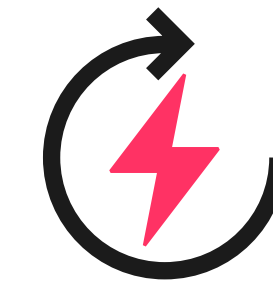
Every investment we make is assessed for both financial and impact credentials. We don't just employ negative screens, every investment opportunity is assessed through our **investment lens** and our **impact lens**.

Be part of the solution

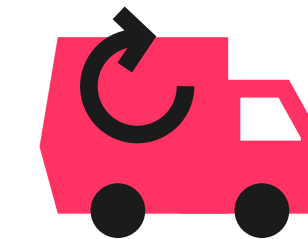
Through the SIMPS impact performance reporting, you can **understand how your SIMPS portfolio is performing.** Monthly factsheet reporting and impact stories will provide you with your SIMPS portfolio's financial performance, along with your social and environmental impacts, giving you the confidence that your wealth is having a positive effect in the areas that matter to you.



CARBON INTENSITY



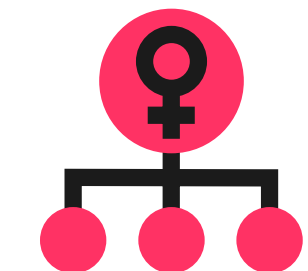
RENEWABLE ENERGY



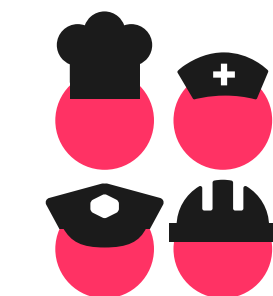
WASTE RECYCLED



FINANCIAL SERVICES



FEMALE CEO AND/OR CFO



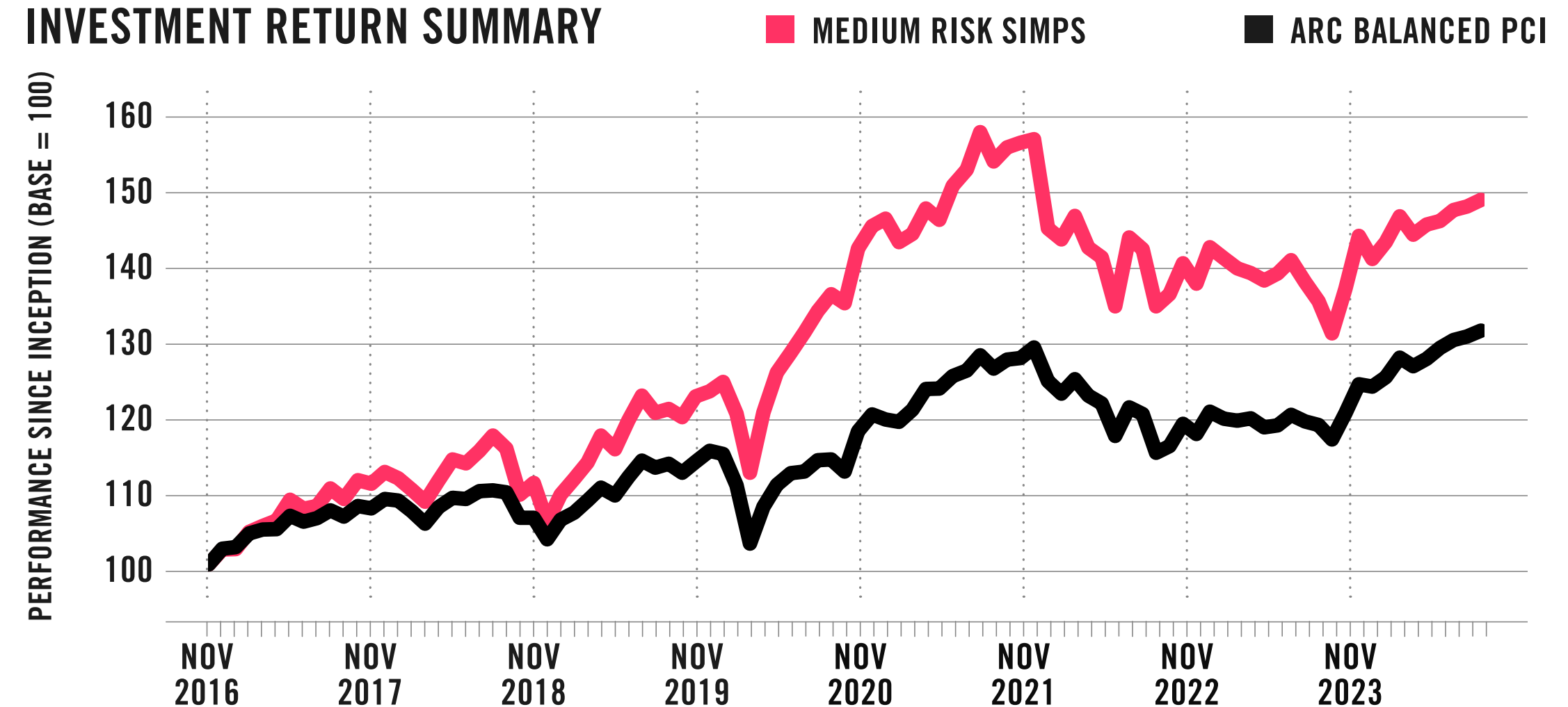
NET JOBS CREATED

Investing in a SIMPS portfolio will mean you'll be taking an **active and informed role** in the shift to a sustainable economy, investing in the right places, and engaged in a broad movement for good.

Creating your financial returns

	SINCE INCEPTION	ROLLING 12 MONTH PERIODS				
TO 30 SEP '24	31 Nov '16 to 30 Sep '24	30 Sep '23 to 30 Sep '24	30 Sep '22 to 30 Sep '23	30 Sep '21 to 30 Sep '22	30 Sep '20 to 30 Sep '21	30 Sep '19 to 30 Sep '20
MEDIUM RISK SIMPS	49.9%	10.2%	0.6%	-12.8%	13.3%	13.0%
ARC BALANCED PCI	32.0%	10.9%	3.3%	-9.1%	10.9%	0.5%
DIFFERENCE	17.9%	-0.7%	-2.7%	-3.7%	2.4%	12.5%

INVESTMENT RETURN SUMMARY



NET PERFORMANCE: The medium risk SIMPS performance is shown after Tribe’s management fee (0.25%) and the underlying fund managers’ fees (OCF of 0.71%*) have been deducted. But it does not include platform and adviser charges. Please note, for the period since inception to 28 February 2022 performance is reported net of VAT.

BENCHMARK:** ARC benchmarks are calculated by collecting actual performance from over fifty investment managers. The balanced PCI is suitable for strategies with a relative volatility of 40-60% of global equities as measured by MSCI ACWI.

Please be aware that 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.

*The ongoing charge figure is variable and is for example purposes only.

Sources: Bloomberg and ARC Private Client Indices (PCI), as at 30 September 2024.

Creating your **impact** returns

The measurement of impact is constantly evolving.

Some of the measures we currently report on are carbon, healthcare, financial services, net jobs created, waste recycled, renewable energy and gender.

¹ Sources: MSCI, US EPA Carbon calculator and climatecare.org flight calculator as at 31 December 2022. Based on scope 1 and 2 emissions of covered listed equities (58% of the medium risk SIMPS portfolio holdings).

² Based on 58% of the medium risk SIMPS portfolio holdings. Third-party fund holding data as at 31 December 2022. Impact data is provided from the following sources: MSCI, Net Purpose Ltd and the underlying company's latest available public reports. Reporting timetables vary company by company.

Carbon saved¹

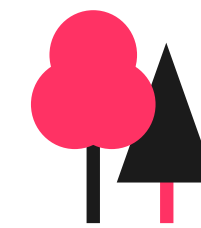
By investing £100,000 in our medium risk SIMPS portfolio rather than in MSCI ACWI, you will **save 6.7 tonnes of carbon dioxide** if invested for 12 months. That represents:



THE CARBON
EMITTED BY:

7 flights

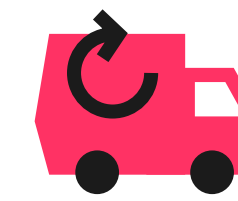
from London to New York in economy class



THE CARBON
SEQUESTERED BY:

110

medium grown coniferous tree seedlings grown for 10 years



THE CARBON
AVOIDED BY:

6 tons

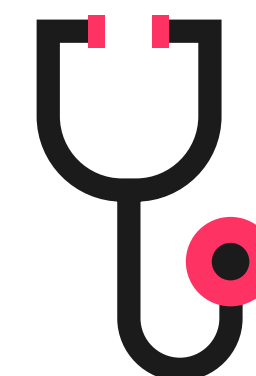
of waste recycled instead of going to landfill

Healthcare provided²

Across all equity holdings¹ in the medium risk SIMPS portfolio, **52 companies provide access to healthcare**. Out of these, **12 report** on the number of people who received access to healthcare.

In total, these 12 companies have provided healthcare to **220,284,428 people**.

Based on the holdings of these companies, that's the equivalent of **1 person** for each £100,000 invested in the multi-theme medium risk portfolio over 12 months.



Join the **Tribe**

Start realising the potential of your wealth
by speaking to your financial adviser today.

+44 203 745 5570

advisers@tribeimpactcapital.com



Tribe | IMPACT CAPITAL

ABOUT US

Tribe is the UK's first dedicated Impact Wealth Manager. Tribe was created in response to a significant increase in demand from individuals who wanted to achieve both sustainable impact and a financial return from their invested wealth.

tribeimpactcapital.com

Tribe Impact Capital,
52 Jermyn Street, London, SW1Y 6LX

Authorised & regulated by The Financial Conduct Authority

Certified



Corporation

IMPORTANT INFORMATION

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*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 information in this brochure is believed to be correct but we cannot guarantee this.