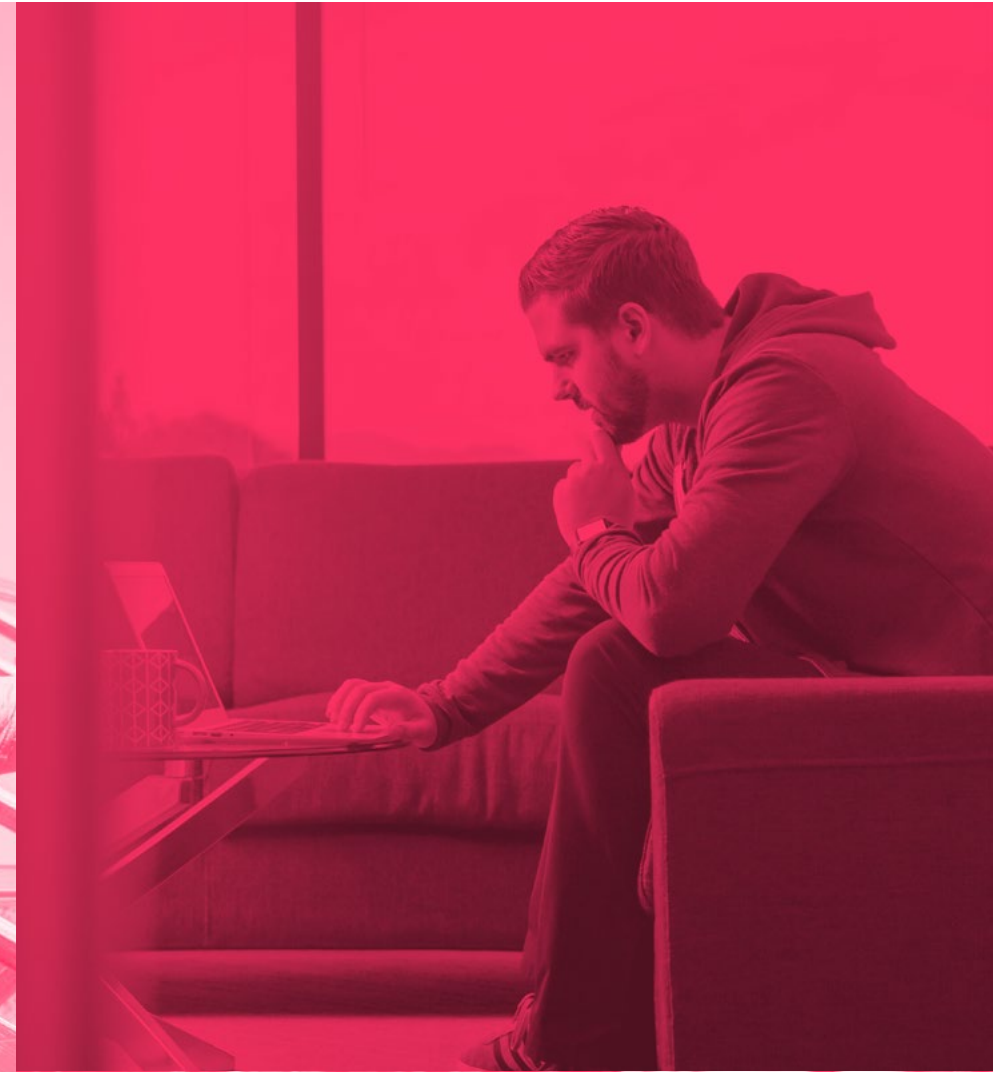


Tribe | **IMPACT CAPITAL**



FINANCIAL ADVISERS

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.

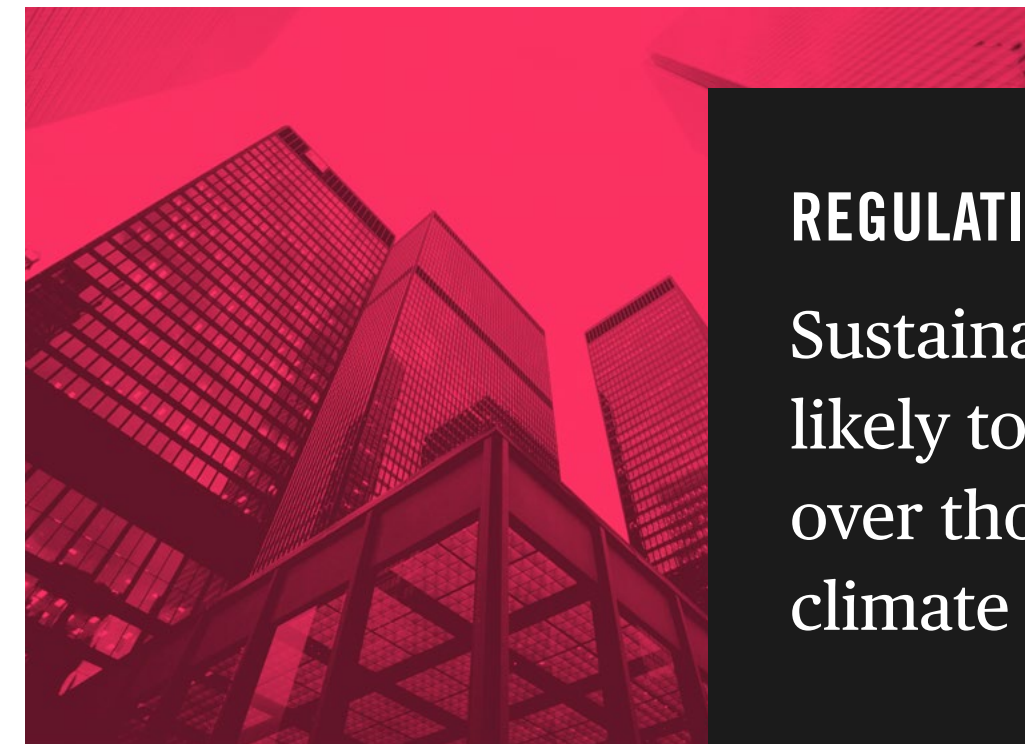
The reality is that companies solving global challenges are improved, future-fit businesses.

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.

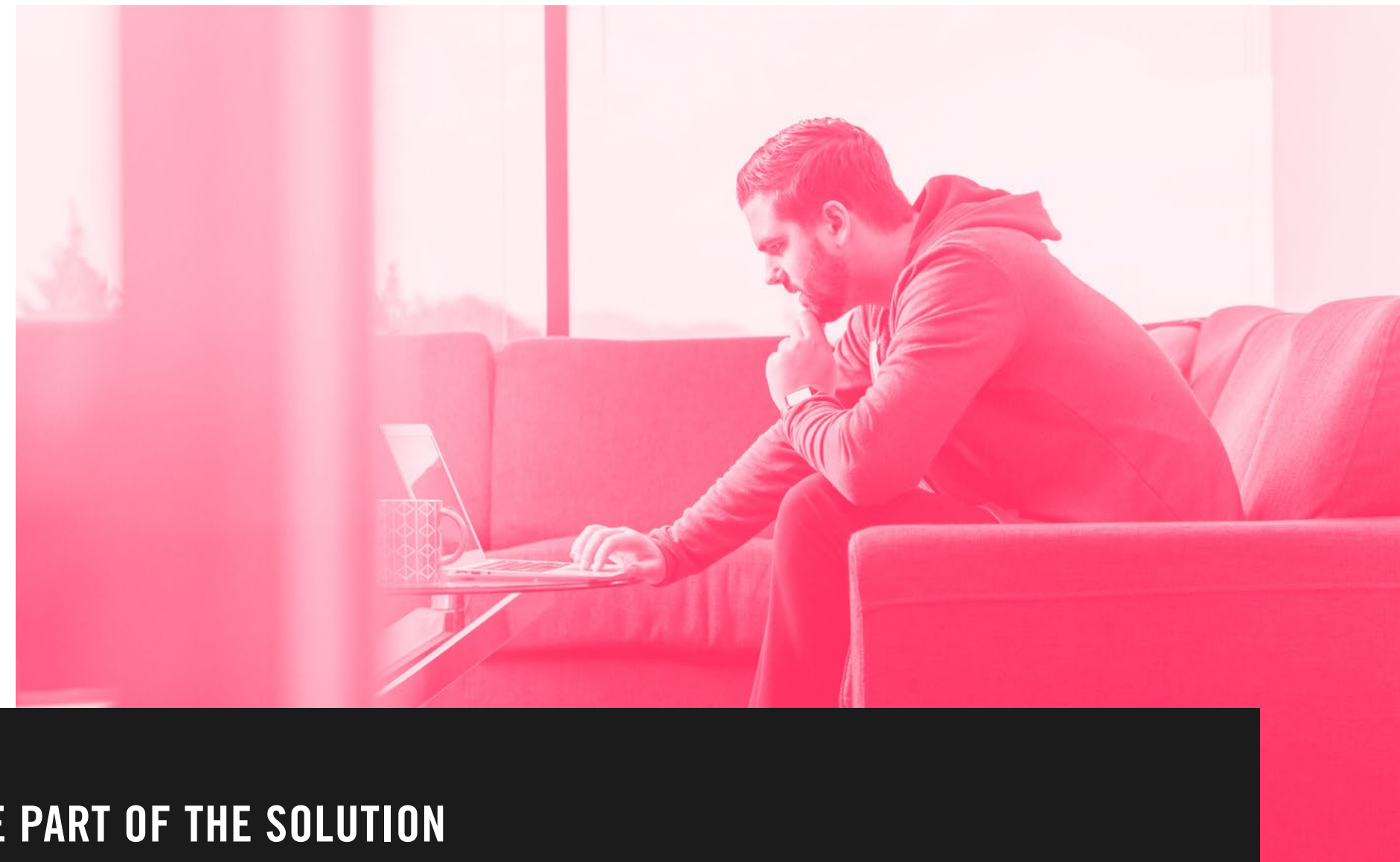
How does it **work**?

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.



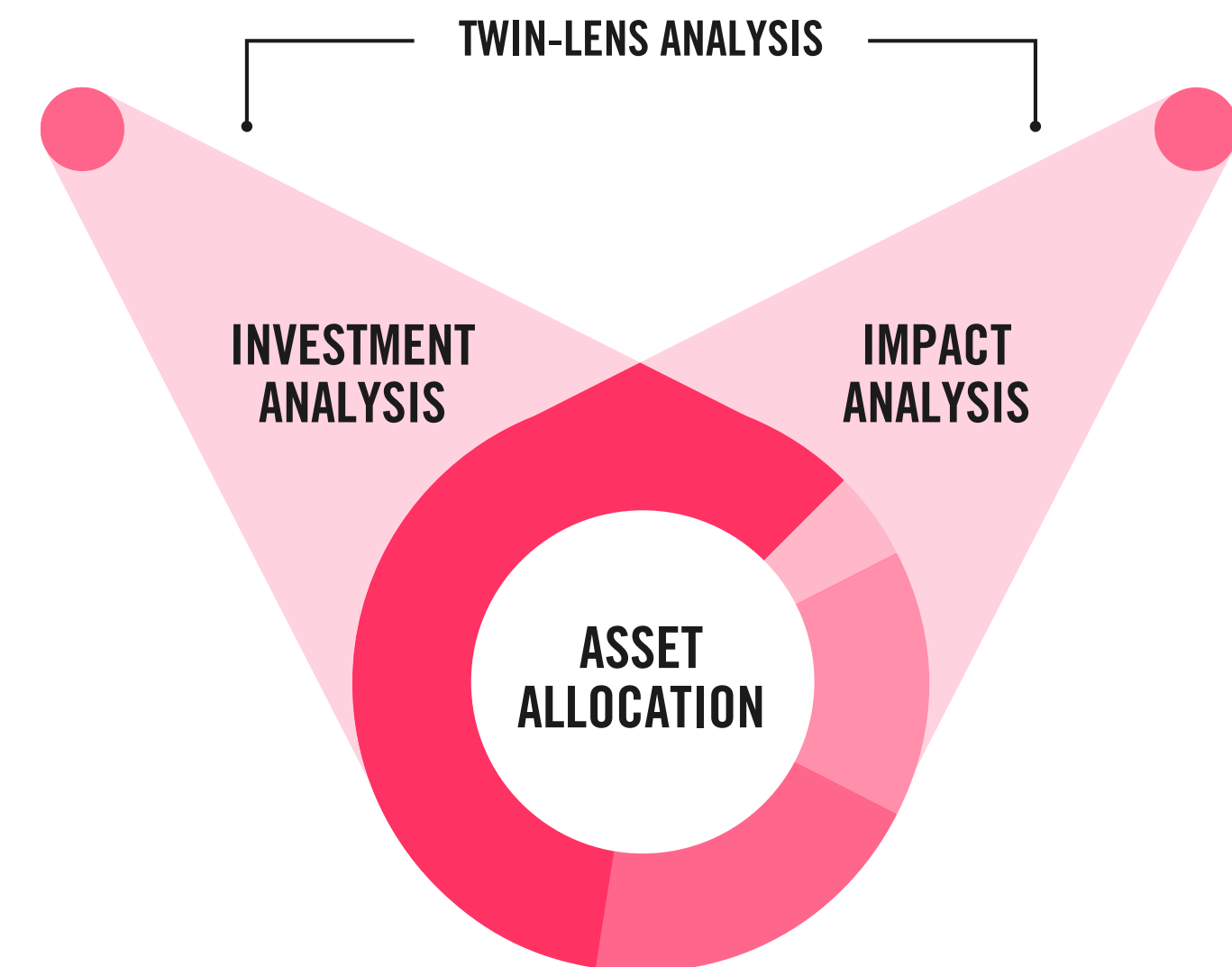
BE PART OF THE SOLUTION

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

Invest in a purposeful portfolio



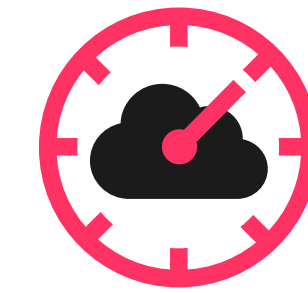
Your SIMPS portfolio is aligned to the SDGs allowing you to **identify the impact** you're creating in the world.



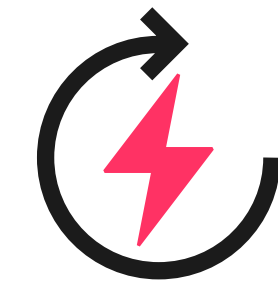
Every investment in your portfolio is assessed for both its **financial performance** and ability to deliver long term **positive impact**. We don't just employ negative screens, every investment opportunity is assessed through our **twin-lens**.

Be part of the solution

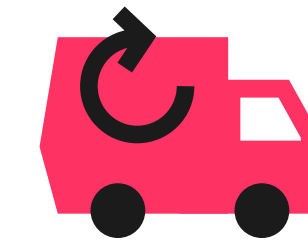
Through the SIMPS impact performance reporting, you can **understand how your SIMPS portfolio is performing**. Monthly factsheet reporting and portfolio stories will provide you with your SIMPS portfolio's financial performance, along with your social and environmental impacts, giving you the **confidence that your wealth is creating the change you want to see in the world**.



CARBON INTENSITY



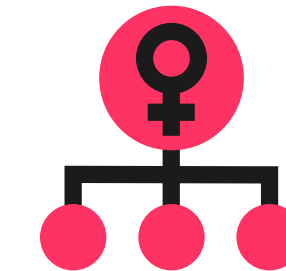
RENEWABLE ENERGY



WASTE RECYCLED



SDG ALIGNMENT



GENDER REPRESENTATION



HEALTH & WELL-BEING

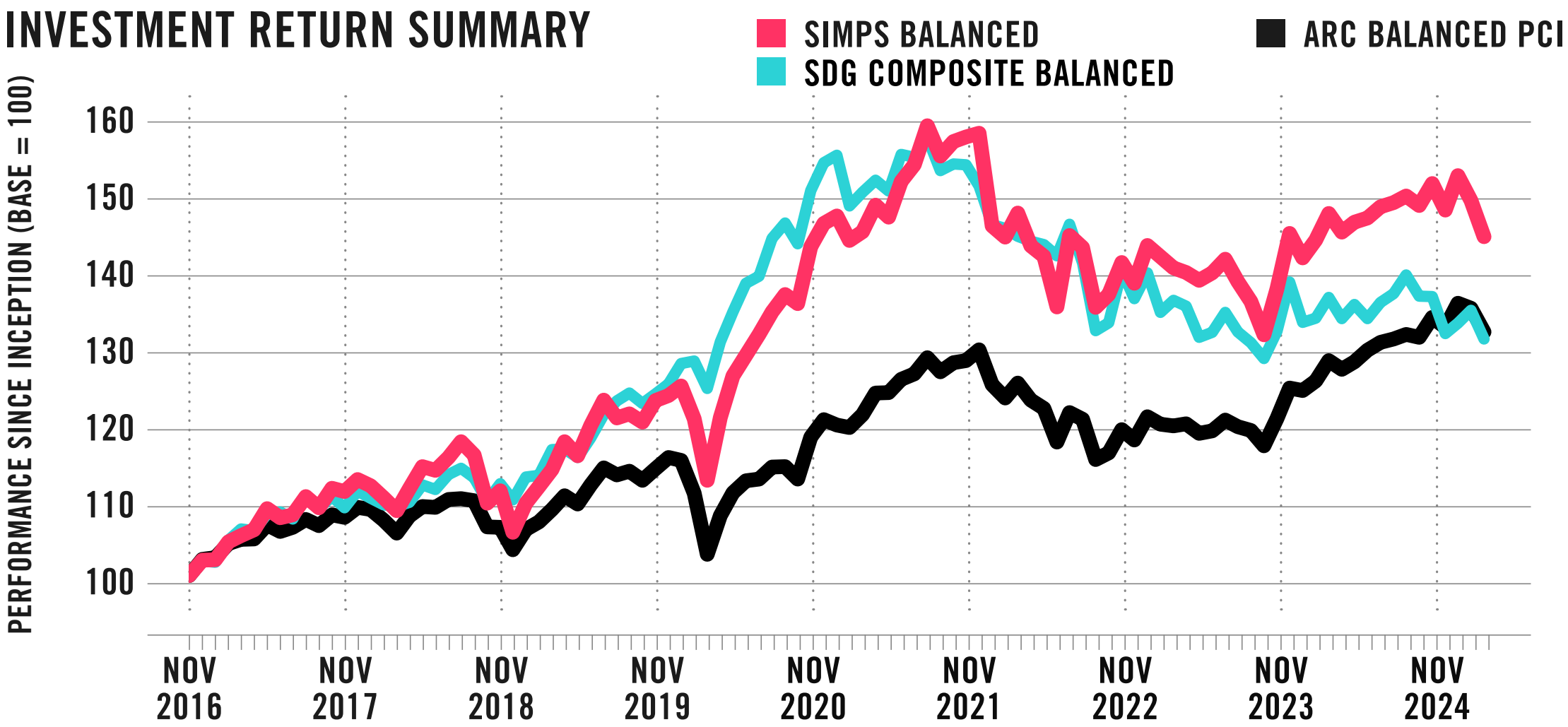
Investing in a SIMPS portfolio will mean you'll be taking an **active and informed role** in the shift to a sustainable economy, investing in the right places, and engaged in a broad movement for good.

Creating your financial returns

NET PERFORMANCE: The SIMPS balanced 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 gross of VAT. Past performance is not a reliable indicator of future results.

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. The SDG Composite is a benchmark of passive indices comprising 50% iShares MSCI Global Sustainable Development Goals ETF, 40% Lyxor Core Bond, 10% iShares Ultrashort Bond.

SOURCES: ARC/Bloomberg, as at 31 March 2025.



	SINCE INCEPTION		CALENDAR YEARS				
	Total return	Annualised	2024	2023	2022	2021	2020
TO 31 MAR '25							
SIMPS BALANCED	44.6%	4.5%	2.1%	4.7%	-12.5	8.1%	18.4%
ARC BALANCED PCI	32.1%	3.4%	6.4%	5.8%	-9.1%	7.6%	4.3%
SDG COMPOSITE BALANCED	31.2%	3.3%	-4.9%	1.6%	-9.8%	-2.0%	23.3%

For illustrative purposes only

Creating your **impact** returns

Some of the measures you're able to tell your impact story through are:

- Carbon intensity
- Waste recycled
- Health and well-being
- SDG alignment
- Renewable energy
- Gender representation

1 Sources: Matter, ClarityAI, underlying companies latest available public reports and third-party fund holdings as at 31 December 2024. Reporting timetables vary company by company. Carbon data provided by US Environmental Protection Agency carbon calculator and climatecare.org flight calculator. Based on 56% of the SIMPS balanced portfolio holdings.

2 Sources: Matter, ClarityAI, Tribe, underlying companies latest available public reports and third-party fund holdings as at 31 December 2024. Data based on 8.2% of total portfolio as some asset data is unavailable.

Carbon difference¹

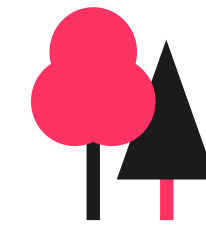
By investing £100,000 in our SIMPS balanced portfolio rather than in MSCI ACWI, you will **save 3.0 tonnes of carbon dioxide** if invested for 12 months. That represents:



THE CARBON
EMITTED BY:

4 flights

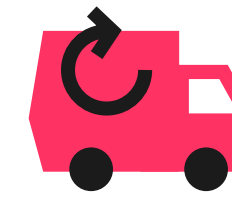
from London to New
York in economy class



THE CARBON
SEQUESTERED BY:

50

medium grown
coniferous tree seedlings
grown for 10 years



THE CARBON
AVOIDED BY:

1 tonne

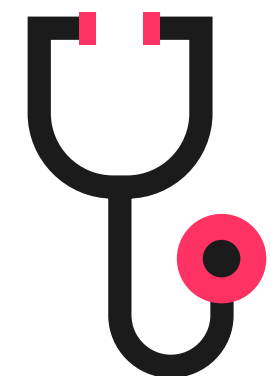
of waste recycled instead
of going to landfill

Good health and well-being²

There are **66 companies** in our sustainable world medium risk portfolio aligned to **SDG 3 outcomes**. They make up 8.2% of the portfolio.

33 of these companies (50% of healthcare exposure by weight) report on the **number of people treated**.

Over 12 months, **9 people** received medical treatment per £1M invested.



Join the **Tribe**

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

+44 203 745 5570

advisers@tribeimpactcapital.com





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



IMPORTANT INFORMATION

This brochure 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 brochure is for illustrative purposes only and does not provide sufficient information on which to make an informed investment decision. 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 ongoing charge figure is variable and is for example purposes only. ***From 31 October 2019 we changed our industry performance benchmark from the ARC Steady Growth to the ARC Balanced benchmark. The

ARC Balanced benchmark is more reflective of our long term Strategic Asset Allocation and relative risk objective over the long term.

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