

# JPM US Sustainable Equity Fund

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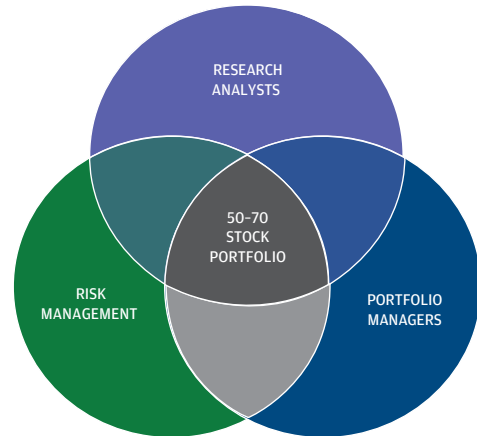


## Invest in sustainable leaders in the US

Seek long-term capital growth from a US equity portfolio with a fundamental, best-in-class sustainable approach.

- EXPERTISE**
- Experienced portfolio managers draw on the fundamental insights of a team of over 20 US equity career analysts, with an average of 21 years' experience, and the partnership of a dedicated Sustainable Investing Team.
- PORTFOLIO**
- A fundamental, best-in-class approach, seeking sustainable companies with attractive expected returns.
- RESULTS**
- Results are driven by bottom-up stock selection, using a research process that has added value for three decades.

## PORTFOLIO CONSTRUCTION



Source: J.P. Morgan Asset Management. For illustrative purposes only.

## A BROAD VIEW OF SUSTAINABILITY

The fund takes a best-in-class approach to sustainable investing, seeking to invest in companies that are sustainable in the broadest sense, with effective governance, superior management of environmental and social issues, and a durable economic model.

ESG ratings from third-party providers remain inconsistent, meaning in-house research is essential. A global perspective is also invaluable given that more than a third of S&P 500 earnings come from overseas. The fund draws on the fundamental insight of over 20 US equity career analysts, supported by the breadth and depth of our global research platform, to seek companies that meet our sustainability criteria and offer attractive expected returns.

## BUILDING A SUSTAINABLE PORTFOLIO

The fund seeks to build a best-in-class sustainable portfolio through a four-step process.

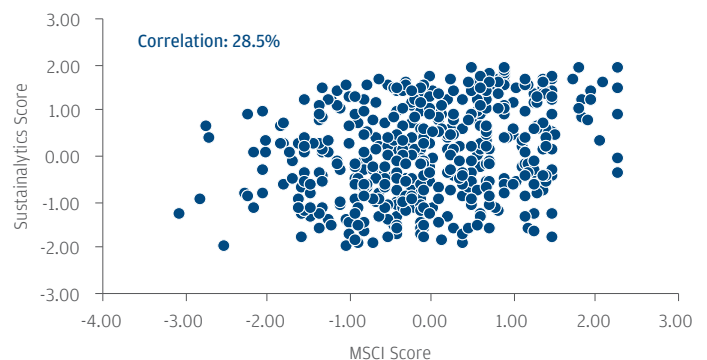
- Exclude unsustainable industries: We exclude industries that are unsustainable based on values that matter to our clients.
- Exclude unsustainable businesses: We exclude stocks that breach norms or are unsustainable based on our proprietary sustainability analysis.

Exclusion does not necessarily mean zero exposure. Thresholds may apply for certain industries. The current exclusion policy can be found on our website.

Source: Bloomberg, S&P Global, Moody's, Sustainalytics, MSCI. As of 31 March 2021.

- Identify sustainable leaders: We invest in companies identified by our analysts as sustainable leaders within their sectors, or as demonstrating improving sustainability characteristics, based on our near-70 question sustainability survey.
- Engage with companies: We use active engagement to understand how companies approach ESG issues, to influence behaviour and to encourage best practice.

## CORRELATION OF MSCI & SUSTAINALYTICS ESG SCORES S&P 500 COMPANIES



**David Small**



Managing Director,  
Director of U.S. Research  
• 21 years of experience, 16 years at JPMorgan

**Danielle Hines**



Executive Director,  
Associate Director of U.S. Research  
• 12 years of industry experience, all at J.P. Morgan

**INVESTMENT OBJECTIVE**

To provide capital growth over the long-term (5-10 years) by investing at least 80% of the Fund’s assets in US Sustainable Companies or US companies that demonstrate improving sustainable characteristics. Sustainable Companies are those that the Investment Manager believes to have effective governance and superior management of environmental and social issues (sustainable characteristics).

**PERFORMANCE (%)**

As the fund inception date is less than a year ago, performance is not currently available.

**RISK PROFILE**

The Sub-Fund is subject to **Investment risks** and **Other associated risks** from the techniques and securities it uses to seek to achieve its objective.

The table on the right explains how these risks relate to each other and the **Outcomes to the Shareholder** that could affect an investment in the Sub-Fund.

Investors should also read **Risk Descriptions** for a full description of each risk.

**Investment risks** *Risks from the Sub-Fund’s techniques and securities*

<b>Techniques</b>	<b>Securities</b>
Hedging	Equities

**Other associated risks** *Further risks the Sub-Fund is exposed to from its use of the techniques, strategies and securities above*

Market	Currency
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**Outcomes to the Shareholder** *Potential impact of the risks above*

<b>Loss</b> Shareholders could lose some or all of their money.	<b>Volatility</b> Shares of the Sub-Fund will fluctuate in value.	<b>Failure to meet the Sub-Fund’s objective.</b>
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