

# INVESTING MEMBERS' MONEY FOR GOOD WITH TRIBE IMPACT CAPITAL

Tribe Impact Capital is proud to collaborate with the Association for Laboratory Medicine as your chosen investment manager, reflecting the Association's enduring commitment to sustainability. With an increasing number of UK adults expressing a desire for their investments to make a positive impact alongside financial returns, the partnership with Tribe Impact Capital aligns perfectly with the Association's vision of doing well and doing good. We're delighted that going forward we'll be able to report to members on the impact of your investments, in addition to financial performance.

Tribe's investment philosophy revolves around the belief that one can achieve both financial success and positive societal impact. Our approach is straightforward: we invest in well-managed companies that are actively addressing global challenges. This dual focus, on financial returns and social responsibility, challenges the conventional notion that profit and purpose are mutually exclusive.

The rationale behind our strategy is grounded in the resilience of sustainable and responsible companies. We believe that companies addressing critical global challenges represent significant growth opportunities and we use the United Nations Sustainable Development Goals (SDGs) to help us define those areas. Our belief is that the businesses working towards solutions for pressing issues, such as clean energy, effective healthcare, education and financial inclusion, are positioned for future-focused growth.

Furthermore, by investing in businesses that prioritise ethical practices, environmental sustainability and social responsibility, we minimise exposure to risks associated with reputational controversies and customer apathy. The emphasis on well-managed enterprises reflects a commitment to avoiding poorly-run businesses and, instead, focusing on those poised for long-term success.

At Tribe we acknowledge the argument that investing exclusively in sustainable ventures may impose constraints on potential sources of return. However, we believe that all investments inherently involve constraints, as the sheer volume of possible investment avenues necessitates focus and specialisation.



## CATE QUENTIN

Wealth Manager,  
Tribal Impact Capital

**Tribe** | **IMPACT  
CAPITAL**

### For more information contact

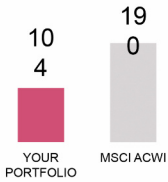
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# Carbon metrics

The measurement of impact is constantly evolving, one of the measures we currently look at is carbon usage.

## Carbon intensity\*

The equities in your portfolio generate **45%** less CO<sub>2</sub> per million sales than the benchmark.



19 COMPANIES IN YOUR PORTFOLIO ACCOUNT FOR AROUND:

### 50% of the total carbon intensity

They include waste and water treatment companies in the heart of circular economy and renewable energy infrastructure companies which we know are more energy intensive.

\* Based on covered listed equities (40% of total portfolio)

\*\* Based on the US EPA Carbon calculator and climatecare.org flight calculator

\*\*\* Impact data is provided from the following sources: MSCI, Net Purpose Ltd, underlying company's latest available public reports and third-party fund holdings as at 30/06/2023.

Reporting timetables vary company by company.

## Carbon saved\*

By investing in your portfolio rather than in MSCI ACWI, you have saved **45 tonnes** of CO<sub>2</sub>. That represents:



THE CARBON EMITTED BY:

**55 flights**  
from London to New York in economy class\*\*



THE CARBON SEQUESTERED BY:

**749**  
medium grown coniferous tree seedlings grown for 10 years\*\*

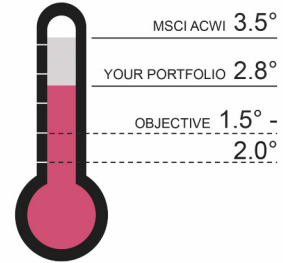


THE CARBON AVOIDED BY:

**15 tonnes**  
of waste recycled instead of going to landfill\*\*

## Warming potential\*

The companies in your portfolio, taking into account all products/services scope 1, 2, 3 emissions and the potential emissions reduction targets have an aggregated warming potential of **0.7°** less than MSCI ACWI.



By narrowing our focus to well-managed companies addressing global challenges, we enhance our ability to identify and support businesses that align with your values.

The economic landscape further supports our investment strategy. The decreasing cost of renewable energy production due to technological advancements, heightened consumer awareness of environmental and societal impacts, and global regulatory commitments to decarbonisation create a favourable environment for companies focused on sustainability. It's in this context that we at Tribe believe impact investing is just good investing. Our partnership with the Association signifies a shared commitment to a future where investments thrive financially and contribute to the betterment of the world.

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

Tribe works in partnership with clients to gain a deep understanding of their values and how these align with the UN SDG framework. Going beyond traditional negative screens allows us to focus on positive selection of responsible, sustainable and impactful investments.

Tribe is a proud certified B Corps 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.