



# Investment solutions for charities

An introduction to our range of investments and services for non-profit organisations.

# Partnering with you

We pride ourselves on working with our charity clients and aim to create transparent, cost-effective and efficient investment solutions.

Whether you are aiming to generate income, long-term growth above inflation, or focus on capital preservation, we will work with you to build a solution, drawing on our range of investment solutions and experience in the charity sector or charitable sector.

Responsible investment is a priority for us at LGIM, and we pride ourselves on working with our clients as we seek to build greener, more sustainable investment portfolios.

At a time when charities face increasing calls for support against a challenging economic backdrop, we offer you our full breadth of support and services to help your charity overcome short-term hurdles while aiming to meet long-term objectives.

**We would be delighted to work with you.**



# Creating a better future through responsible investing

At LGIM, we believe environmental, social and governance (ESG) factors – such as climate change, social inequality and executive pay – are financially material, and that they can be essential to mitigating risks, unearthing investment opportunities and help strengthening long-term returns for clients



## LGIM ESG score

Our [ESG scores](#) feed directly into our asset allocation and security selection decisions for a broad range of our active and index investment solutions. Our ‘continuous feedback loop’ of engagement, voting and analysis means that our scores have a real impact on our portfolio construction. We recognise that ESG factors can increasingly play a role in determining the performance of certain assets and that a full set of analytical tools can help investors navigate risk and identify those companies that might succeed in a rapidly changing world.

At LGIM, we calculate our own ESG scores and have developed a proprietary, rules-based approach to scoring companies from an ESG perspective. In addition to using the scores to inform our investment decisions, we also aim to improve markets globally and incentivise companies to improve their credentials.



## Active ownership

As a significant global investor, we use our scale and influence to bring about real change in the companies and markets in which we invest. We are active shareholders on our clients’ behalf, and we publish our voting actions in full [on our website](#). We uphold three key principles:

- we vote every share [in countries which allow];
- we vote every vote in the same direction, enabling us to use LGIM’s full influence; and
- we do not abstain.

Our Investment Stewardship team is wholly independent. Rather than reporting into our CIO, they engage with companies alongside LGIM’s investment teams, to address company-specific and market-wide risks and opportunities. Additionally, the team works with regulators, policymakers and our peers to tackle systemic issues. Our quarterly ESG Impact Report and our annual Active Ownership Report provide full details of our activities and progress.



## LGIM Climate Impact Pledge

Climate change is one of the defining issues of our time. We support efforts to limit carbon emissions to net zero by 2050 and under our [Climate Impact Pledge](#) we commit to helping companies reach this objective.

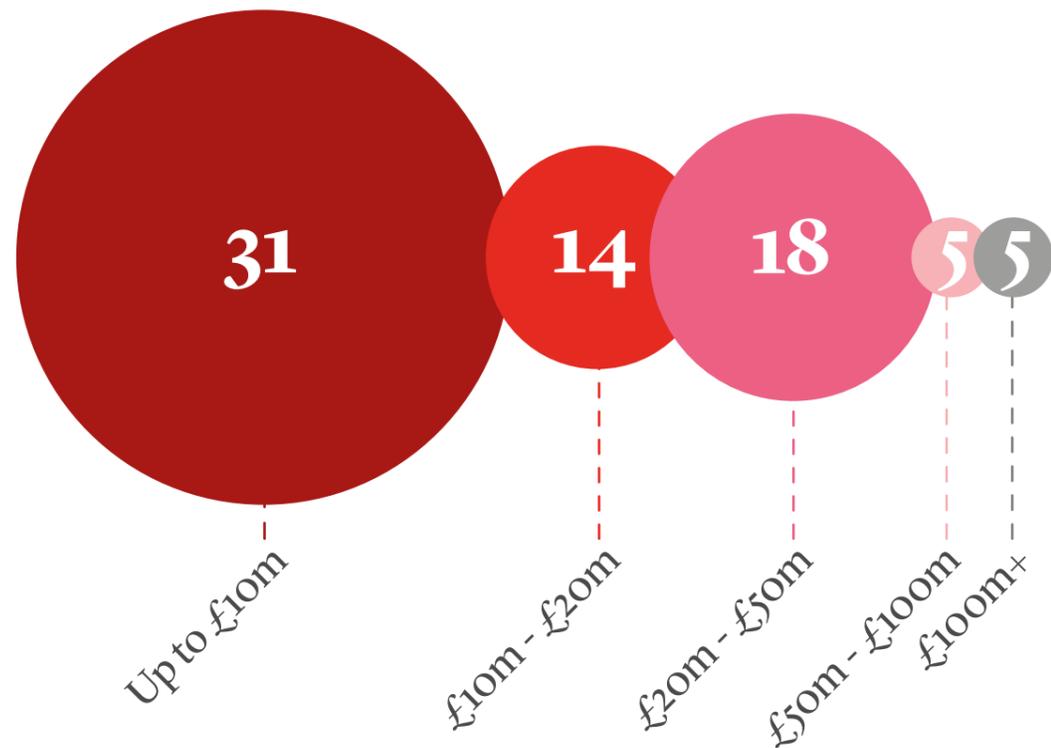
We have mapped about 1,000 companies worldwide, in several climate-critical sectors, against key indicators. Using quantitative and qualitative measures, we assess them under a ‘traffic light’ system, drawing on independent data providers and our pioneering climate modelling. These metrics inform our engagements. We take action against companies that fail to demonstrate adequate climate commitments, through our voting rights across our entire book and investment decisions within some of our funds. We celebrate successes, too.

# Bringing our charity clients the best of LGIM

## Our range of investment solutions

As one of the largest asset managers globally, we aim to offer our charity clients portfolio solutions across the full spectrum of active and index mandates. We offer both pooled and bespoke solutions, and our dedicated charities team can provide you with regular updates about your investments with us.

## Our client base: endowments by size



### Key risk

The value of any investment and any income taken from it is not guaranteed and can go down as well as up, and investors may get back less than the amount originally invested.

Source LGIM data as at 31 December 2020. 1. Charity Finance Fund Management Survey 2020. These figures include assets managed by LGIMA, an SEC Registered investment Advisor. Data includes derivative positions. May not total due to rounding.

# How we work with you



## Understanding your needs

A thorough understanding of your charity's investment objectives and timeframes is the keystone of our relationship with you.

We discuss your investment beliefs and your concerns, working with you to formulate an investment strategy that incorporates both, and that can evolve to capture changes in your objectives and in the investment landscape over time.



## Identifying solutions

Building on our understanding of your needs, we can draw on our range of solutions and experience to construct an investment portfolio which aims meet your objectives. Depending on your charity's size, we can work with you to find cost-effective options spanning a range of objectives, from capital preservation, to income generation and growth. At LGIM, we aim to create a better future through responsible investing, and we work with all our clients to create greener, sustainable investment solutions.



## Efficient implementation

LGIM's scale and longstanding experience enable us to offer our charity clients the benefit of a range of vehicles. As a large investor, we are also able to implement trades efficiently and cost-effectively, passing the savings onto our clients.

### Key risk

The value of any investment and any income taken from it is not guaranteed and can go down as well as up, and investors may get back less than the amount originally invested.



**LGIM news and views**

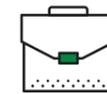
To help all our clients stay up to date with the latest market news and our research on current investment themes, we draw on our global research and analysis expertise to write, record and publish blogs, podcasts and articles to keep you informed. You can also sign up to receive regular email updates from us on macroeconomic topics.



# About LGIM

A trusted partner across the investment spectrum

**£1,421bn**  
of assets under management



**Solutions**

**£605bn**

Largest UK LDI manager with growing market share in UK DC and Retail



**Index / FBI**

**£502bn**

A market leader in traditional and alternative index investing. Capabilities include ESG, ETFs and factor-based investing



**Real Assets**

**£37bn**

Significant business in UK property, infrastructure, and private credit



**Multi-Asset**

**£78bn**

Focused on risk-managed, growth and income portfolios. Diversified funds designed to meet investors' objectives



**Active Strategies**

**£199bn**

Broad fixed income and equity capabilities, delivering high-conviction portfolios

## Meet the team

Our dedicated charities team



**Richard Lubbock**  
Client Director



**Holly Hopwood**  
Client Manager



**Natacha Celie-Bond**  
Client Manager



**Jordan Bishop**  
Client Relationship Executive

## A global team

Delivering long-term value



**406**

Investment professionals



**16 years**

Average industry experience

### Key risk

The value of any investment and any income taken from it is not guaranteed and can go down as well as up, and investors may get back less than the amount originally invested.

Source: LGIM internal data as at 31 December 2021. The AUM disclosed aggregates the assets managed by LGIM in the UK, LGIMA in the US and LGIM Asia in Hong Kong. The AUM includes the value of securities and derivatives positions and may not total due to rounding.

# Contact us

For further information about LGIM, please visit [lgim.com](http://lgim.com) or contact your usual LGIM representative



## Key risks

Past performance is not a guide to the future. The value of an investment and any income taken from it is not guaranteed and can go down as well as up, you may not get back the amount you originally invested.

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