Do you have Ethical funds on the system?

Last Modified on 10/01/2024 12:36 pm GMT

If a fund has an ethical policy, its factsheet will include a green marker at the bottom of the first section which gives the basic details of the fund. This is illustrated and highlighted in the first screenshot.

Fund details						Aviva Life International Ltd Aviva Alliance Trust UK Ethical							
						Save as FDF Graph Home page Help							
Choose the information to		contracts											
Aviva Alliance Trust UK	Ethical (Not FSA R	ecognised)							84	ised on FE	Classi	fication	
Promoter:	Aviva Life Interna						lyr Jyr	597	(r1 Y	r2 Yr3			
Type:	Offshore fund		Quartile										
FE Global/ABI sector:		GL:Equity - Ethical / DO:Equity - Ethical					Second 18						
Launch date:	10/05/1999							Alpha					
Sizel	GBP 1m												
Manageri	Toby Belsom (since 01/08/2012)							Sharpe					
Charges	1.15% annual												
This fund has an ethical p	/	_	_										
						der der i	de vier vie	7					
Past performance (bid-t	o-bid)												
Cumulative perf. %	Sector	Percentage	e gain/les	s in each 1	2-month p	eriod (mo	st recent fi	rst)					
1 year 12.09	-0.79	Yr 1	Yr 2	Yr 3	Yr 4	Yr S	Yr 6	Yr 7	Yr B	Yr 9		¥r 10	
2 years 12.88	2.36	12.09	0.71	29.00	19.14		11.53			20.5	5	16.82	
3 years 45.61	25.07	22.07											
4 years 73.48	38.56				_					_			
5 years 63.75	26.43						_						
6 years 82.62	32.56												

Clicking on the link in this box (the text "**ethical policy**") then displays a separate document describing the exact details of the fund's ethical policy. This is illustrated by the second screenshot.

STN APTIC			Aviva Alliance Trust UK Ethical						
Fund's ethical policy			Save as PDF Fund details Home page Help						
Aviva Alliance Trust UK	Ethical								
Promoter: Type: Sector: Launch date: Size: Manager:	Aviva Life Internation Offshore fund DD::Equity - Ethical 10/05/1999 GDP 1m Toby Belsom (since 0								
Ethical summary									
Ethical Fund:		Yes							
Ethical Date Verified:		June 2015							
Negative Criteria									
Alcohol - Production:		Yes							
Alcohol - Sale:		Yes							
Animal Intensive Farmi	ing - Retail:	Yes							
Animal Intensive Farmi	ing - Wholesale:	Yes							
Animal Testing - Cosme	etics and Toiletries:	Yes							
Animal Texting - Pharm	aceuticals:	Yes							
Environmental Abuse		Ves							
Financial Services:		No							
Gambling		Yes							

The information about a fund's ethical policy is divided up into the following sections:

- Areas of investment which the fund avoids (e.g. tobacco, animal testing).
- Areas of investment which the fund actively seeks to participate in (e.g. conservation).
- Membership of groups such as UKSIF.
- Details of the fund's monitoring and investment-approval processes.

You can return to the main fund factsheet from the ethical policy by using the Fund details link

on the menu bar.