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Press Release

** 7th November 2022 **

Scopic Research Adds M&G's Sustainable Multi Asset Suite to its Multi Asset DNA reports service

The three funds in the M&G Sustainable Multi Asset suite are the newest additions to our Multi Asset DNA research service.

The suite comprises the following funds:

- **M&G Sustainable Cautious Multi Asset Fund.**
- **M&G Sustainable Balanced Multi Asset Fund.**
- **M&G Sustainable Growth Multi Asset Fund.**

(Paul Ilott, Managing Director, Scopic Research):

"Although all multi asset funds are very likely to have their own unique DNA, the M&G Sustainable Multi Asset suite is even more exceptional in our view.

The approach is highly distinctive and combines a focus on investing in companies that have highly rated ESG characteristics as well as those involved in activities that have a positive impact upon the planet, with the multi asset team's own interpretation of behavioural finance. This leads to identifying mispriced, unloved sustainable themes being represented using baskets of stocks.

The concentration of assets in unloved sustainable themes leads to a value-style bias, and the investment journey is therefore likely to differ from that of more growth biased sustainably focused peers. Another difference is that diversification isn't necessarily achieved by holding a continuously diverse spread of investments, but by counterbalancing one mis-priced theme against another with the prospect of them offsetting one another in performance terms in the event that a key market risk identified by the team comes to pass."

Scopic assigns characteristics to individual multi asset portfolios, which for the M&G Sustainable Multi Asset suite are as follows:

Positive return bias > 3 to 5 years / Volatility ceiling / Pragmatic / Sustainable

Alex Matcham, Head of UK Wholesale, M&G Investments commented…

'M&G Investments is pleased to be working with the team at Scopic in adding the M&G Sustainable Multi-Asset Range to their Multi-Asset DNA reports service. Such databases and research tools can add considerable value to the advice process, particularly at a time when clients are demanding transparency in how such solutions can deliver upon both their expected risk/return outcomes and sustainability preferences.'

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Multi Asset DNA Reports Service

The Multi Asset DNA reports service is available via our website and enables intermediaries to filter our database of DNA reports by using combinations of investment outcomes specifically designed to reflect their clients' needs for different classifications for growth, income delivery, volatility management, likely volatility risk versus broader equity markets, and methods for managing ESG.

The service also includes a qualitative based portfolio blending tool designed to help intermediaries visualise the possible diversification benefits from combining two multi asset funds together, as well as a quarterly sentiment indicator that shows the current direction of sentiment towards a broad range of asset classes as expressed by some of the UK's leading multi asset teams.

Intermediaries can register for the service for free at www.scopicresearch.co.uk

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About Scopic Research

Scopic Research was established in 2009 to enable investment professionals to benefit from the same information advantages that a skilled analyst with direct access to portfolio managers has when seeking to recommend multi asset investments to their clients.

We conduct robust, insightful research to provide you with a greater understanding of the likely investment journey for a given multi asset portfolio, a graphic depiction of each multi asset investment's DNA, more meaningful peer groups, a portfolio blending tool, and vastly improved differentiation between propositions.

The sources we use are predominantly primary. This includes regular portfolio manager meetings and quarterly qualitative-based monitoring. We also analyse risk adjusted performance between market inflection points using quantitative data.