



Performance
with principles®

Responsible & Sustainable Multi-Asset Balanced Fund

Target Market Criteria



Client type	• Retail • Professional counterparties • Eligible counterparties
Knowledge and experience	• Low • Medium • High
Financial situation, with a focus on the ability to bear losses	• Investors who tolerate a moderate loss in their investment or initial amount • Investors who tolerate a loss of the entire investment or initial amount
Risk tolerance and compatibility of the risk/reward profile of the product with the target market	• Compatible with High Risk investment (investor is willing to accept the risk of losses up to or exceeding the investment or initial amount)
Investment Term	• Long
Investment Objective	• Appreciation
Liquidity	• Requires the possibility to exit the investment early
Additional Criteria	• Portfolio diversification • Other specific requirements (e.g. Green, ethical investment etc)
Distribution Strategy	• Advised • Non-advised • Execution only • Discretionary
Not suitable for	• Investors with no tolerance for loss in their investment or initial amount • Low Risk Investment (investor is not willing to accept any loss of the investment or initial amount) • Investors who are looking for capital protection

For further information please speak to your normal EdenTree representative, visit edentreeim.com or call our support team on **0800 011 3821**

Proudly part of the **BENEFACT GROUP** 

This document has been prepared by EdenTree Investment Management Limited for Financial Advisors, other intermediaries and other investment professionals only. It is not suitable for private individuals. This document has been produced for information purposes only and as such the views contained herein are not to be taken as advice or recommendation to buy or sell any investment or interest thereto.

EdenTree Investment Management Limited (EdenTree) Reg. No. 2519319. Registered in England at Benefact House, 2000, Pioneer Avenue, Gloucester Business Park, Brockworth, Gloucester, GL3 4AW, United Kingdom. EdenTree is authorised and regulated by the Financial Conduct Authority and is a member of the Investment Association. Firm Reference Number 527473.