edentree | Investment Management *for Charities*

A different kind of investment partner for Charities



Investing with purpose. Partnering for the long term.

Modern charities face increasingly complex investment decisions. Trustees must balance today's needs with tomorrow's ambitions, protecting and growing capital over time while ensuring investments support their organisation's mission and ethical standards. For these investors, financial performance is one element in a large set of considerations.

Choosing the right investment manager is therefore about much more than returns. For a charity, a suitable manager needs to:

- Share your long-term perspectives
- Understand stewardship in depth
- Have a genuine commitment to the charitable sector.

EdenTree is a dedicated sustainable investment manager, with a heritage in values-led investing spanning more than 35 years. It began with the launch of our first ethical fund in 1988 and continues to shape how we invest today.

We look beyond financial performance alone, carefully considering the environmental and social impact of the companies we invest in and actively engaging with them as responsible shareholders. For your charity, this means an investment approach designed to pursue your financial objectives while reflecting the values that matter to you. We are also the only UK investment manager ultimately owned by a charity, The Benefact Trust, giving us a unique connection and understanding of the sector we serve.

Managing your assets. Prioritising your values.

At EdenTree, sustainable investing isn't part of a broader offering. It's our sole focus.

Many investment managers have introduced sustainable investment capabilities in recent years. At EdenTree, sustainable investing has long been at the heart of what we do.

Our dedicated sustainable investment specialists identify high-quality businesses capable of generating long-term returns whilst contributing positively to society and the environment. This integrated approach has been refined over decades and informs all stages of our investment process.

This makes EdenTree a strong partner to charities across operating sectors. We're a manager whose investment philosophy naturally aligns with principles of stewardship, responsibility and long-term thinking.



Ownership matters.

For many charities, the ownership structure of the investment manager they partner with is becoming increasingly important. Across the asset management industry, mergers and acquisitions have driven consolidation, with investment firms increasingly bought, sold and integrated into larger financial groups. Ownership changes can result in disruption for clients, as firms' priorities, culture and services can shift under new management. In turn, this can make it difficult for charities to plan for the longer term.

EdenTree's unique ownership model avoids these potential issues.

- We are owned by the Benefact Trust, a registered charity, as part of Benefact Group, an international family of specialist financial services firms.
- We don't answer to private equity owners.
- Our ownership structure allows us to prioritise long-term stability and alignment with the organisations we serve.



A unique alignment with the charity sector.

EdenTree's commitment to sustainable investing is reinforced by the objectives of the wider Benefact Group. Benefact exists to create **positive impacts through business**, and gives available profits to charity. To date, the Group has **donated over £250 million** to charitable causes and community initiatives, making it one of the **UK's largest corporate donors.**

Being owned by a charity gives EdenTree a distinct perspective among financial companies. We have a unique understanding of the responsibilities, governance requirements and long-term objectives of charities, and this expertise helps us to align closely with the organisations we serve.

We believe investments should be **managed responsibly**; that organisations should take a **long-term view** wherever possible; and that financial success should create **wider societal benefits.**

These principles are at the heart of both EdenTree and Benefact, and underpin all of our client relationships.

BENEFACT GROUP

Why charities choose EdenTree

- We are a **dedicated sustainable investment manager**, with more than 35 years experience in values-led investing.
- Our **dedicated sustainable investment team** works alongside our investment professionals to integrate sustainability considerations throughout the investment process.
- We take a **responsible approach to stewardship**, actively engaging with the companies we invest in to drive positive change.
- Transparent reporting and clear communication to help charities **understand investments in depth** and make informed decisions.
- A deep understanding of the charity sector and mission-led investing, including the need to balance financial objectives, governance responsibilities and charitable purpose.
- A genuine commitment to **long-term partnership**, helping charities pursue their financial objectives without compromising on their mission or values.

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Whether you are reviewing an existing investment manager relationship, exploring sustainable investment for the first time or seeking an investment partner whose values better reflect your own, we would be delighted to speak with you.

Together, we can explore how your charity's investments can support both your financial objectives and your wider mission.

Start a conversation today by emailing



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Why consider EdenTree?

At EdenTree, charities gain access to:

- One of the UK's most established sustainable investment specialists.
- More than three decades of sustainable investment expertise.
- An organisation owned by a charity, not external shareholders.
- The strength and stability of Benefact Group.
- A partner committed to serving charities for the long term.

EdenTree Investment Management.

Investing for a Better Tomorrow.

Stable ownership in a changing market

As ownership structures across the investment industry continue to evolve, EdenTree remains part of a charity-owned group whose purpose and long-term commitment to the sector are embedded in its foundations. Our ownership model is designed for stewardship and continuity, not short-term commercial gain.