

Fund overview

- This is a low-cost, systematic, data-driven fund that leverages Robeco's extensive research to identify and take advantage of market trends.
- The portfolio can deliver variable returns over the short term but aims to deliver strong positive growth over periods of seven years and longer.
- The fund invests in a highly diversified portfolio of shares listed in developed markets like the US, Europe and Japan, with a focus on the most sustainable companies.
- It can be used as part of a diversified global portfolio.

What this fund aims to do:

- Using a systematic, data-driven approach, this fund aims to perform in line with the MSCI World Index at a low cost, while investing in a portfolio of companies with high sustainability characteristics.
- Based on decades of research that shows that investors behave in predictable ways, the fund makes use of algorithms overseen by a team of managers to identify how markets are moving and invest accordingly to capture returns.
- Robeco closely monitors the portfolio to ensure that the fund always delivers returns close to the index, but with lower risk.
- The fund can be used within a diversified global portfolio.

'We prefer shares with strong sustainability characteristics because we see them as higher quality. For example, we find that firms with happy employees are more motivated and more efficient. That leads to better share returns.'

– Wilma de Groot, Head of Quantitative Equities

How this fund invests:

- The Curate Global Sustainable Equity Fund holds a portfolio of hundreds of shares, selected through Robeco's systematic, data-driven approach.
- The fund aims to deliver returns that match or slightly exceed the MSCI World Index, but with an emphasis on companies with lower levels of carbon emissions, water usage and waste generation.
- The portfolio will look similar to the MSCI World Index but will exclude certain types of companies, and focus on those with stronger environmental, social and governance (ESG) credentials.
- Led by the head of quantitative equities, Wilma de Groot, the team at Robeco is constantly researching new ideas and new ways of thinking about markets to develop and improve its systematic strategies.