

8<sup>th</sup> February 2021

## Foster Denovo announces launch of Passive Sustainable Dynamic Portfolios range

Foster Denovo Limited ([www.fosterdenovo.com](http://www.fosterdenovo.com)), the multi-award winning financial advisory business, has today announced that it has added a new passively managed range to its Sustainable Dynamic Portfolios (SDPs).

The Passive Sustainable Dynamic Portfolios will supplement the firm's existing actively managed range of SDPs, and are designed to provide clients with an additional option to do more with their savings and investments than purely generate a competitive financial return. This range is designed to appeal to clients who want to know that risks to financial returns relating to environmental, social and governance factors are being factored into investment decisions.

The new passive range will consist of five portfolios constructed around different levels of risk. The portfolios will be invested in physically backed ETFs that exclude companies without clear ESG practices while maintaining a strong focus on the client's financial path.

Each portfolio will be subject to rigorous ongoing investment and sustainability risk assessments, led by independent external experts including sustainable and impact investing fund research specialists, Worthstone, as well as Foster Denovo's Head of Investment Research, Declan McAndrew.

Along with Foster Denovo's actively managed strategies, the passive SDPs provide a suitable range for a variety of client circumstances, such as their attitude to risk, investment time frame and investment goals. Passive management by its very nature will focus more on ESG risk mitigation investing rather than the more progressive investing available in active management.

**Commenting on the launch of the portfolios, Roger Brosch, CEO, Foster Denovo said:** "We are delighted to add these exciting passive options to our Sustainable Dynamic Portfolios range. We believe it will provide a complementary low-cost choice for investors seeking asset growth, whilst managing the risks from environmental, social and governance (ESG) factors."

**Declan McAndrew, Head of Investment Research added:** "Our Sustainable Dynamic Portfolios have been carefully designed to balance investment risk with returns to help achieve clients' financial goals, taking into account different attitudes to risk, time frame, capacity for loss and crucially environmental, social and governance (ESG) criteria. Within this new range, as within our Active SDPs, we have focused on combining internal and external expertise to build portfolios that will proactively adapt to this rapidly changing and exciting field."

This new launch will allow us to cater to an even broader range of investors who are looking for investment portfolios that can manage risk, while also delivering aspirational outcomes that reflect their financial objectives."



**ENDS**

### **About Foster Denovo**

Foster Denovo Limited ([www.fosterdenovo.com](http://www.fosterdenovo.com)) is a multi-award winning national firm of financial advisers with eight offices across the UK. Its Partners provide specialist financial advice and wealth management to individuals and their families, as well as financial advice and guidance to businesses, employers and charities.

Advice for individual clients covers the full range of advisory areas, including financial planning, wealth management, retirement solutions, at retirement advice, estate planning, mortgages and protection.

Foster Denovo has 70+ financial advisers (Partners) who are supported by 150+ employees.

Foster Denovo Limited is part of the Foster Denovo Group Limited, which is authorised and regulated by the Financial Services Authority.

The Group also owns an investment management company, Sequel Investments Limited ([www.sequelinvestments.com](http://www.sequelinvestments.com)).

