



Foresight

FOR A SMARTER FUTURE

**FP FORESIGHT
SUSTAINABLE FUTURE
THEMES FUND**

INVESTOR PRESENTATION

July 2023

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SECTION 1

Foresight Group Overview

Foresight Group Overview





A leading sustainability-driven global infrastructure and private equity manager



As at 30 June 2023

Created in 2017, FCM currently manages ~12% of Foresight Group AUM













FCM has 4 investment strategies offered across the UK and the EU

Product	Strategy	Strategy Inception	Strategy AUM	Fund names	Sectors	Target returns
	Foresight UK Infrastructure	December 2017	£513m	<ul style="list-style-type: none"> FP Foresight UK Infrastructure Income Fund ("FIIF") 	<ul style="list-style-type: none"> Renewable Energy Core Infrastructure Medical Property Government Facilities Digital Infrastructure 	The investment objective of the Fund is to generate income and preserve capital with potential for capital growth over an investment term of 5 years.
	Foresight Global Infrastructure	June 2019	£424m	<ul style="list-style-type: none"> FP Foresight Global Real Infrastructure Fund ("GRIF") VAM Global Infrastructure Fund ("VAM") Foresight Global Real Infrastructure (Lux) Fund ("Foresight SICAV") Cromwell Foresight Global Sustainable Infrastructure Fund ("CROM") 	<ul style="list-style-type: none"> Renewable Energy Core Infrastructure Medical Property Government Facilities Digital Infrastructure 	The Fund aims to grow, over any 5-year period, by more than 3% per annum above the rate of UK inflation (as measured by the UK Consumer Prices Index).
	Foresight Sustainable Real Estate	June 2020	£99m	<ul style="list-style-type: none"> FP Foresight Sustainable Real Estate Securities Fund 	<ul style="list-style-type: none"> Logistics Healthcare Offices Forestry Commercial Government Property Early Learning Centres Data Centres Communications Self-Storage 	The Fund aims to provide an income yield of 4% net of fees with a secondary objective to achieve capital growth over a rolling 5-year period.
	Foresight Sustainable Future Themes	March 2022	£10m	<ul style="list-style-type: none"> FP Foresight Sustainability Future Themes Fund ("SFT") 	<ul style="list-style-type: none"> Sustainable Energy, Sustainable Land, Food, Forestry Waste , Water and the Circular Economy Health and Education Digital World 	The fund aims to grow capital over a five-year period by investing in companies which meet the manager's sustainability criteria for positive environmental and/or social impact.

An Experienced Team Highly Regarded by the Investment Industry

A strong track record acknowledged by the investment community

FCM Team

	Nick Scullion Partner		Mark Brennan Partner
	Eric Bright Senior Investment Manager		Aqib Hashamali Senior Investment Manager
	Giles Opie Head of FCM Operations		Alexandra Neto Strategy Manager
	Santiago Mendez-Cabezas Investment Manager		Louis Bromfield Lead Sustainable Investment Associate
	Sefa Degirmenci Investment Analyst		Jasmine Savage Investment Analyst
	Isobel Hillebrandt Operations Analyst		Laura Ellis PA to FCM Partners and Team

Key Achievements

2017	<ul style="list-style-type: none"> CFCM team established by Foresight Group
2018	<ul style="list-style-type: none"> Named Fund Manager of the Year at the PLC Awards FIIF surpasses annual yield of 5% and achieves total return of 11.65%
2019	<ul style="list-style-type: none"> GRIF delivers 13.44% total return by first anniversary FCM team reaches £500m AUM
2020	<ul style="list-style-type: none"> FIIF celebrates third anniversary with a total return of 28.14% outperforming the FTSE All Share by 26.51%
2021	<ul style="list-style-type: none"> GRIF named as a finalist for the Investment Week Best Sustainable & ESG Alternative Assets Fund FIIF is chosen by Tom Stevenson, Investment Director at Fidelity, as one of his Five Top Fund picks for 2021 REF named finalist in ESG Investing Awards 2021 – Best Real Estate / Property Fund
2022	<ul style="list-style-type: none"> SFT wins ESG Clarity ‘Most Innovative Fund Launch’ award FCM nominated in Investment Week’s Sustainable Investment Awards for ‘Best Sustainable Investment Research Team’ REF wins National Sustainability Awards’ ‘Real Estate Fund of the Year’ award
2023	<ul style="list-style-type: none"> Cromwell Foresight Global Sustainable Infrastructure Fund is launched, representing FCM’s expansion into the US market



SECTION 2

Fund Overview and Investment Philosophy

FP Foresight Sustainable Future Themes Fund

1

Why FP Foresight Sustainable Future Themes Fund?

- The structure of society and economies is changing rapidly in response to the need for sustainable development.
- The winning companies of the future are going to be the ones that innovate to participate in that change.
- This fund gives investors an access point to invest in companies we believe will deliver the best financial outcomes and the most tangible, real-world impact for sustainable development.

2

Why Foresight Capital Management?

- Foresight Group has experience directly managing assets and businesses across the themes that we have identified as key pillars of sustainable development.
- Foresight Capital Management are active, high conviction, bottom-up investors with an industry leading in-house sustainable investment process.

3

Why now?

- This fund targets companies that are at the leading edge of global sustainable development and that help to mitigate the climate emergency.
- Staying within the limit of a 1.5°C world requires immediate, far-reaching and unprecedented changes in all aspects of society.
- Sustainability is an increasingly important factor for both retail and institutional investors and will be a key determinant of future corporate success.

FP Foresight Sustainable Future Themes Fund

Aims to deliver growth by investing in the core themes of sustainable development & decarbonisation

FP Foresight Sustainable Future Themes Fund



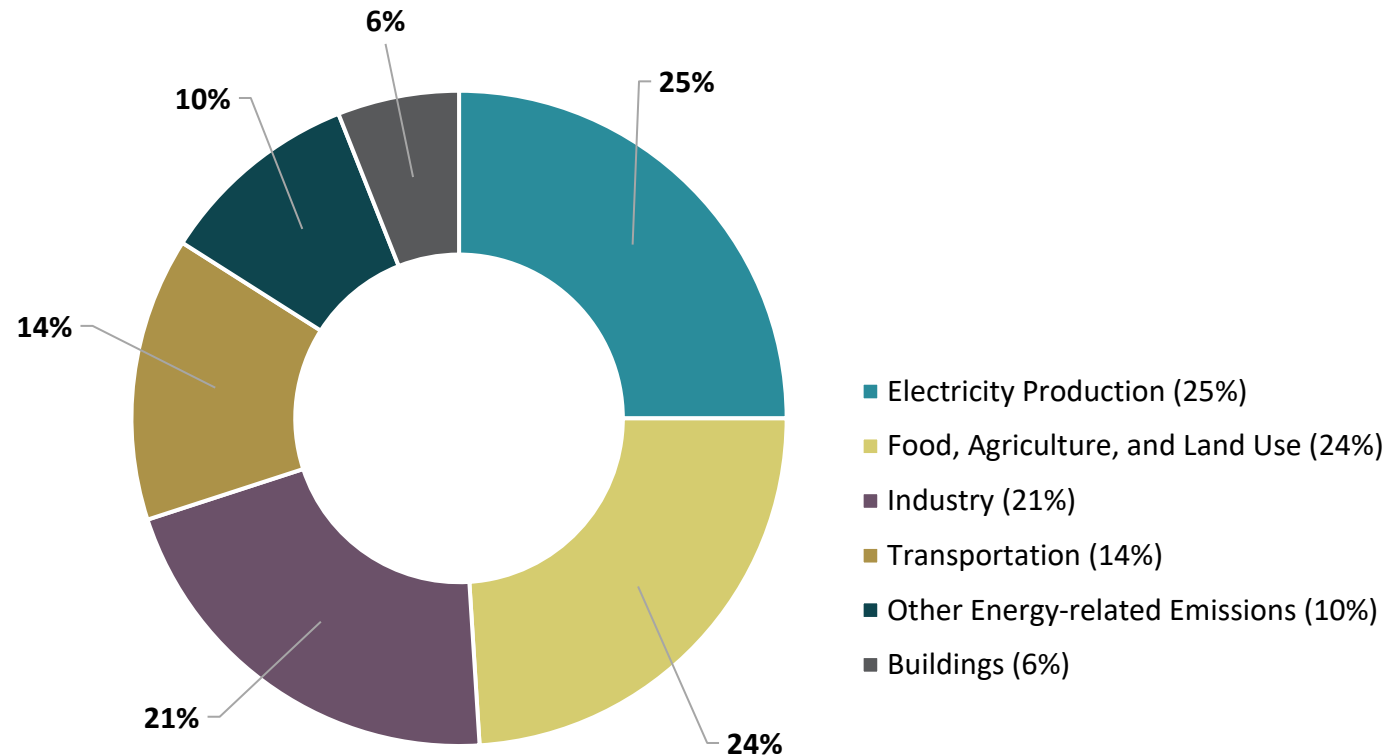
Key Features:

Strategy	■ Targeting attractive risk adjusted returns by investing in a global portfolio of scalable listed companies that address the core themes of sustainable development and decarbonisation.
Performance Objective	■ To grow capital over a five-year period by investing in companies which meet the manager's sustainability criteria for positive environmental and/or social impact.
Investment Universe	<ul style="list-style-type: none">■ Sustainable Energy: companies actively contributing to global decarbonisation through sustainable energy generation, storage and usage;■ Sustainable land, Food & Forestry: companies involved in the sustainable production of food, use of land, agriculture or forestry and those focused on the protection of biodiversity;■ Waste, Water and the Circular Economy: companies that are actively involved in delivering sustainable water and waste solutions and companies that meaningfully contribute to sustainable resource management;■ Health and Education: companies that own assets or provide services that contribute towards the delivery of sustainable, high-quality and inclusive healthcare and education; and■ Digital World: companies that support the transition to a digital economy in a sustainable and socially inclusive way.
Investment Basis	■ Long-only
Number of Stocks	■ 30 - 40 companies
Currency Management	■ GBP Unhedged Share Class (Acc & Inc units)
Inception	■ 28 March 2022

Greenhouse Gas Emissions Sources

Virtually every activity in modern life – growing things, making things, getting from place to place – involves releasing GHGs

Global Greenhouse Gas Emissions* (%)



- Emissions need to **fall by 7% year on year** over the next two decades. To put this into context, CO2 emissions fell about 7% in 2020 when we had full scale lockdowns imposed due to COVID-19.

- Getting to zero **requires a broad approach**: zero-carbon ways to produce electricity, make things, grow food, keep buildings warm and cool, and move people and goods around the world.

Sustainable Future Themes

The team identifies and provides capital to companies at the core of sustainable development

Sustainable Energy

- Energy Generation, Distribution and Storage
- Energy Efficiency
- Electrification
- Carbon Capture, Utilisation, and Storage
- The Energy Supply Chain



Sustainable Land, Food and Forestry

- Sustainable Farming and Food Production
- Sustainable Forest Management
- Environmental Restoration



Waste , Water and the Circular Economy

- Sustainable Building Materials
- Resource Renewal
- Electronic Recycling
- Sustainable Water Practices
- Municipal Recycling



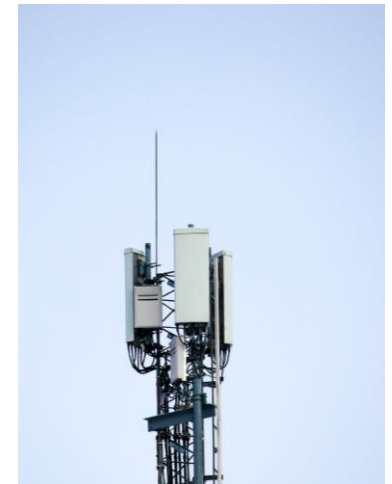
Health and Education

- Access to Quality Healthcare
- Access to Quality Education
- Early Learning
- Distance Learning



Digital World

- Digital Infrastructure
- Digital Finance
- Building Automation
- Connected Devices



Why should we address the climate crisis?

The difference between a 1.5°C and 2°C temperature rise results in dramatically different outcomes

Incidence	1.5°C	2°C	2°C Impacts
Extreme Heat Global population exposed to severe heat at least once every five years	■ 14%	■ 37%	■ 2.6x worse
Sea-Ice-Free Arctic Number of ice-free summers	■ At least 1 every 100 years	■ At least 1 every 10 years	■ 10x worse
Sea Level Rise Amount of sea level rise by 2100	■ 40cm	■ 46cm	■ 6cm worse
Permafrost Amount of Arctic permafrost that will thaw	■ 4.8 million KM ²	■ 6.6 million KM ²	■ 38% worse
Crop Yields Reduction in maize harvests in tropics	■ 3%	■ 7%	■ 2.3x worse
Fisheries Decline in marine fisheries	■ 1.5 million tonnes	■ 3 million tonnes	■ 2x worse
Coral Reefs Further decline in coral reefs	■ 70-90%	■ 99%	■ Up to 29% worse

Environmental Impact

- More frequent and more severe droughts.
- More frequent and destructive wildfires.
- Rising sea levels due to polar ice melt.
- The amount of food acquired from each acre of crop will drop.
- Extra heat will make animals less productive and food more expensive
- Climate change has already triggered a 6th mass extinction event, with extinction rates 100 times higher than expected.

Social Impact

- Environmental destruction disproportionately affect the world's poorest people.
- Food scarcity and famine can lead to mass displacement, civil unrest and war.
- In the worst drought ever recorded in Syria (2007 to 2010) 1.5 million people left farming areas for the cities, helping to set the stage for the armed conflict that started in 2011.

Prioritising Double Materiality

Double materiality focuses on a company's operational footprint whilst also assessing the environmental and social impacts of the products and services that company provides.

Segment of Top 10 Common Holdings by GICS Sector
(MSCI research, 2021)

Name	ESG Rating	# Funds (Top 20)	Average Weighting (%)
Alphabet Inc	BB	12	1.93
Microsoft Corp	AAA	9	5.09
Adobe Inc	AA	8	1.25
Apple	BBB	7	5.68
Nvidia	AAA	7	1.67

The Largest ESG Funds - Under The Bonnet

- Most ESG funds are domiciled in Europe where ESG has long been established however the geographic focus of most funds is US equities.
- Sector exposures across the Top 20 Largest ESG Funds revealed that **information technology was the largest allocation** in most funds and almost zero allocation in energy.
- **Google** was the most widely held stock, followed by **Microsoft**, **Adobe** and **Apple**.
- This was one of the key-drivers behind outperformance of ESG funds as tech stocks rallied in 2020.
- Many of the holdings in the largest ESG funds would not pass SFT's sustainable investment criteria.

Prioritising Double Materiality

Double materiality focuses on a company's operational footprint whilst also assessing the environmental and social impacts of the products and services that company provides.

Snapshot of SFT Holdings
(April 2022)



The Sustainable Future Themes Fund - Under The Hood

- Double materiality is a critical lens through which all potential SFT holdings are assessed.
- Companies such as Adobe, Microsoft, and Apple have wide-reaching operational climate targets, but their products will **not lead to the decarbonisation of the global economy**.
- SFT's portfolio holdings are defined by their innovative products and services that seek to **address the climate imperative** whilst their **sustainable operations are embedded** into long-term strategies.
- SFT's holdings companies operate across diverse sectors of the global economy and without their products, services and sector leadership the world will **not be able to limit global warming to 1.5°C or 2°C**.

Achieving A Just Transition

Without serious adaption, climate change is likely to push millions further into poverty and limit the opportunities for sustainable development necessary for people to escape poverty.

UN Sustainable Development Goals



The Problem

- Climate change aggravates the effects of population growth, poverty, and rapid urbanisation.
- The concept of a just transition relates to how the costs and benefits of transitioning to a net zero carbon economy will be **distributed among different parts of the world**.
- The top **10% of the world's income distribution are responsible for 50% of global GHG emissions**, while those in the bottom half only account for 10% of emissions.
- Minorities and low-income communities are disproportionately harmed by climate change's effects.
- Vulnerable groups are disparately affected by the onset of heat waves, worsening air quality, and extreme weather events, which has ramifications for physical and mental health and financial well-being.

Key Focuses Of A Just Transition

Environmental Sustainability

Decent Work

Social Inclusion

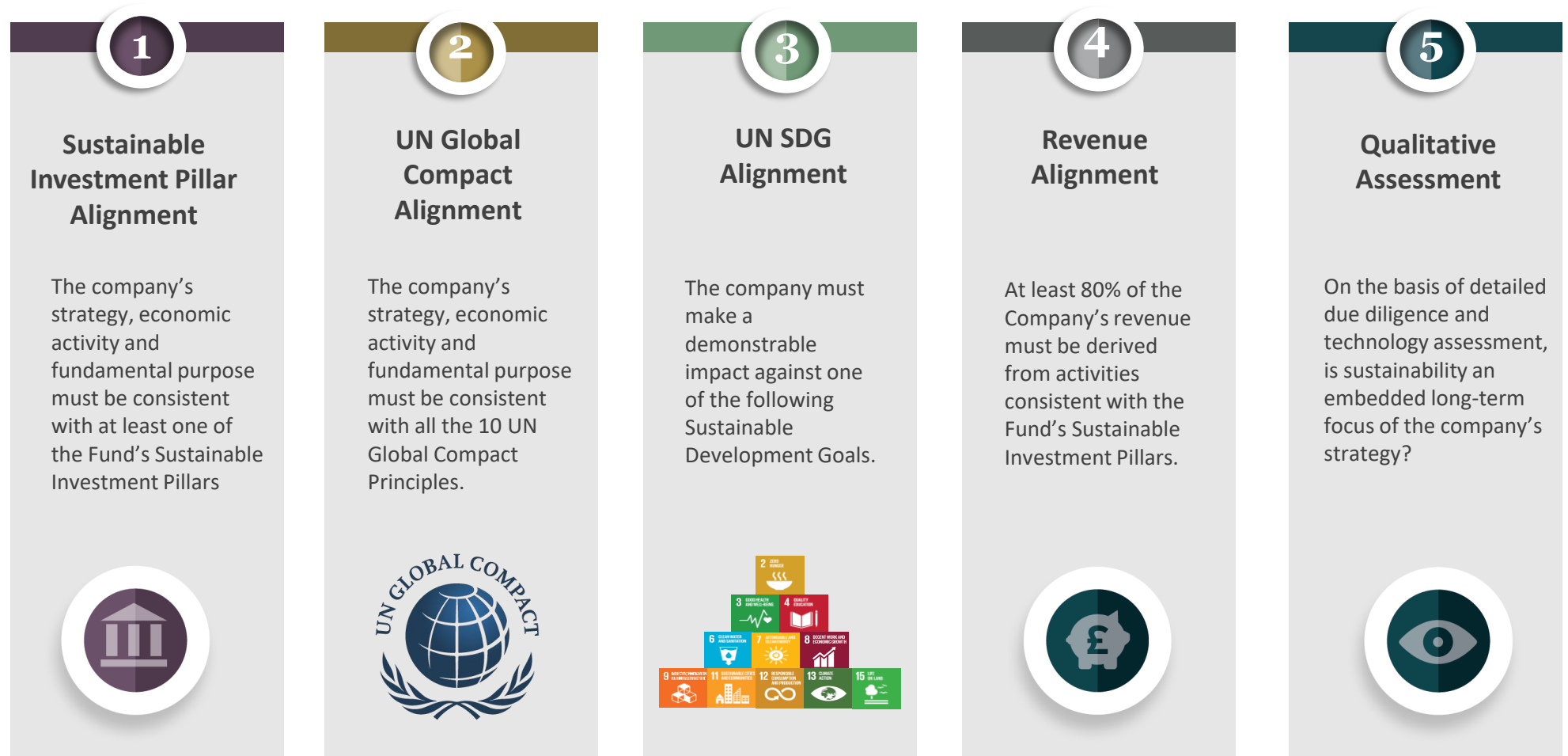
Poverty Eradication

Sustainable Solutions Within The Sector

- Reducing the impacts of climate on people requires a **systematic view of the challenge**; addressing sectors such as transport, low-carbon buildings, energy, and agriculture.
- The UNFCCC, UN SDGs, and the Paris Agreement aspire to transform the way in which development issues and climate change are addressed.
- Through their 17 global goals and 169 targets, the UN SDGs provide the **most comprehensive and balanced global development agenda** to help countries meet immense development challenges.
- In many cases, reducing climate change impacts will have a **greater positive benefit for the most vulnerable**, who would otherwise be most severely impacted by climate change.

Sustainable Investment Process

Considering the operational footprint and economic activity of a company is integral to transitioning to a decarbonised, more climate-resilient global economy.



Foresight Capital Management's Private Market Insight

FCM are able to rely on Foresight Group's in-house business segments to bring private market expertise to public market investing.

Sustainable Future Fund

In-house Expertise	Sustainable Energy	Sustainable Food, Land and Agriculture	Waste, Water and the Circular Economy	Health and Education	Digital World
Private Market Insight	<ul style="list-style-type: none"> Second-largest solar manager in Europe, operating over 1.9GW. Portfolio of c.890 MW of onshore wind. One of largest private sector investors into UK waste-to-energy sector. 	<ul style="list-style-type: none"> Foresight Sustainable Forestry PLC listed in November 2021. Specializes in forestry and afforestation projects. Foresight Group has completed 16 sustainable forestry acquisitions. 	<ul style="list-style-type: none"> Private investment focus on bioenergy and waste. High-level expertise across waste management value chain. Industry connections across metal recycling investment universe. 	<ul style="list-style-type: none"> Foresight Group purposefully invest into companies and assets that contribute towards the delivery of sustainable, high-quality and inclusive healthcare and education. 	<ul style="list-style-type: none"> Foresight Group is partnering with specialist consultants to digitalise its sustainable infrastructure assets. Includes forestry, social projects and sustainable transport infrastructure.
Company Asset	 <p>Kinagar Wind Farm</p>	 <p>Shorthope Forest</p>	 <p>Oakleaf Recycling</p>	 <p>Biofortuna Ltd</p>	 <p>Sawmills Solar Farm</p>

Foresight Capital Management's Private Market Insight

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Sustainable Future Fund

In-house Expertise	Sustainable Energy	Sustainable Food, Land and Agriculture	Waste, Water and the Circular Economy	Health and Education	Digital World
ESG Insight	<ul style="list-style-type: none"> ■ Sustainability-led offerings integrated across investments. ■ Developed Sustainability Evaluation Tool for integrated sustainability assessment and monitoring. 	<ul style="list-style-type: none"> ■ Carbon credit market and afforestation. ■ Leasing land to renewable energy developments. ■ Afforestation grants to support planting. ■ Third-party certification. 	<ul style="list-style-type: none"> ■ Foresight Group is a certified carbon neutral company and is setting science-based targets. ■ Insight into processes and commitments for fund holdings to implement science-based targets. 	<ul style="list-style-type: none"> ■ Insight into how to evaluate, monitor, and report on impact across the healthcare and education sector. ■ Bespoke sustainability methodologies used to assess investments. 	<ul style="list-style-type: none"> ■ Company specialism in digitalisation of sustainable infrastructure. ■ Expertise in data management, efficient handling of assets, and supply chain risk management.
Company Asset	 <p>Kinegar Wind Farm</p>	 <p>Shorthope Forest</p>	 <p>Oakleaf Recycling</p>	 <p>Biofortuna Ltd</p>	 <p>Sawmills Solar Farm</p>



SECTION 3

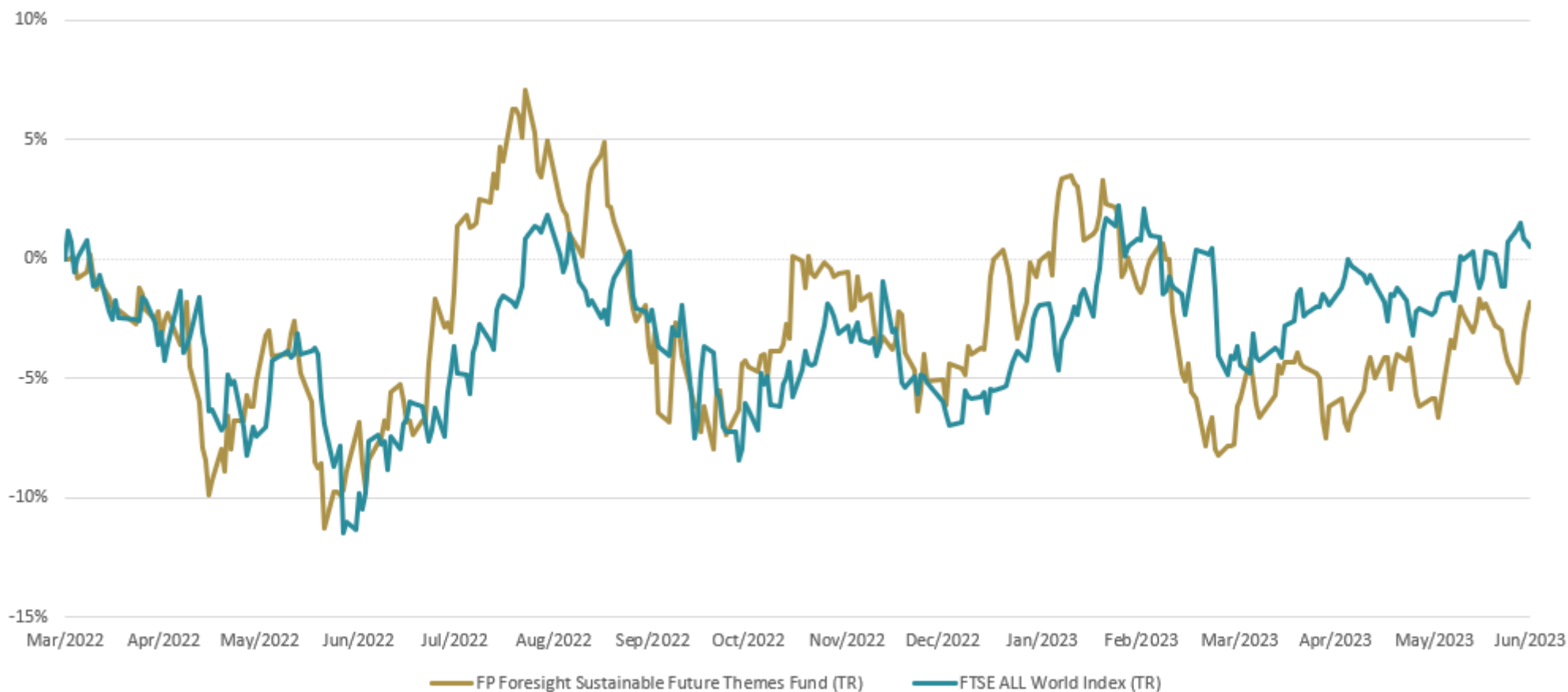
Portfolio

Top Ten Investments in the Portfolio

Company	Theme	Listing Location	Allocation
Stantec	Water, Waste & The Circular Economy	Canada	4.86%
Johnson Controls	Water, Waste & The Circular Economy	United States	4.43%
UPM-Kymmene	Sustainable Food, Land, and Forestry	Finland	4.37%
Equinix	Digital World	United States	4.34%
EDPR	Sustainable Energy	Portugal	4.29%
Owens Corning	Water, Waste & The Circular Economy	United States	3.95%
PotlatchDeltic	Sustainable Food, Land, and Forestry	United States	3.92%
Orsted	Sustainable Energy	Denmark	3.85%
DSM-Firmenich	Sustainable Food, Land, and Forestry	Netherlands	3.82%
Weyerhaeuser	Sustainable Food, Land, and Forestry	United States	3.82%

As at 30 June 2023

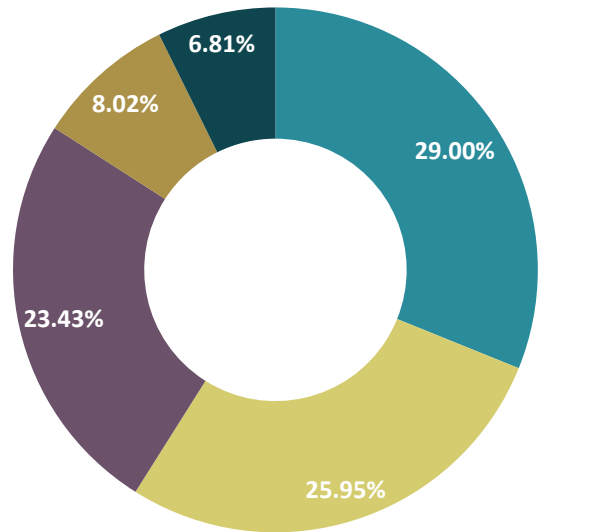
Track Record



	1M	3M	6M	1YR	2YR	3YR	4YR	5YR	Since Inception ¹
FP Foresight Sustainable Future Themes Fund (TR)	4.29%	4.30%	2.70%	8.64%	-	-	-	-	-1.82%

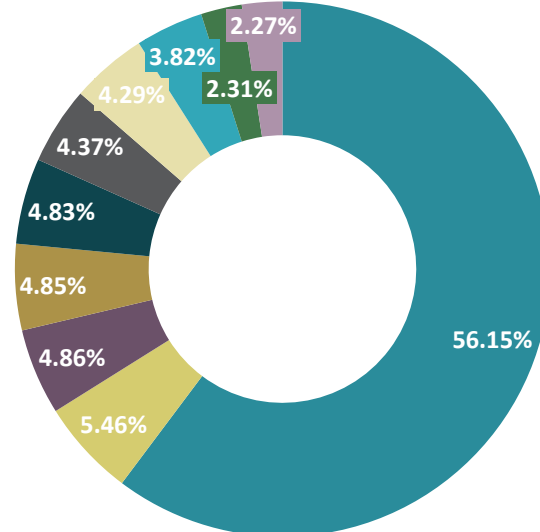
Portfolio Breakdown

Sustainable Investment Theme



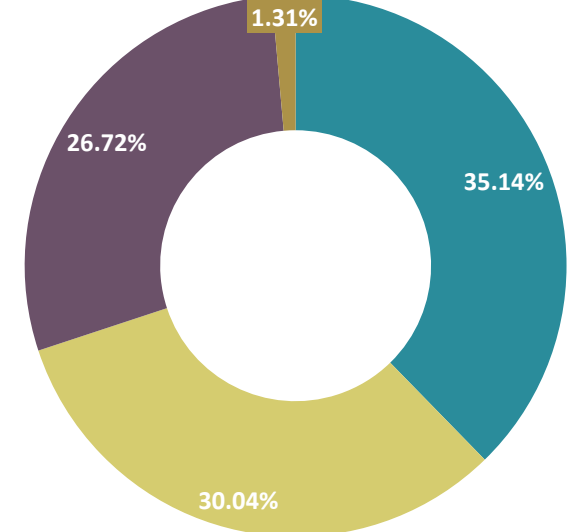
- Water, Waste & The Circular Economy (29.00%)
- Sustainable Energy (25.95%)
- Sustainable Food, Land & Forestry (23.43%)
- Health & Education (8.02%)
- Digital World (6.81%)

Listing Location



- United States (56.15%)
- Australia (5.46%)
- Canada (4.86%)
- Denmark (4.85%)
- United Kingdom (4.83%)
- Finland (4.37%)
- Portugal (4.29%)
- Netherlands (3.82%)
- Norway (2.31%)
- Switzerland (2.27%)

Market Capitalisation



- Mega Cap (>£20bn)
- Large Cap (£5bn-£20bn)
- Mid Cap (£500m-£5bn)
- Small Cap (<£500m)

As at 30 June 2023



SECTION 4

Case Studies

Sustainable Energy

The challenge

“ *Electricity demand will double and potentially treble by 2050 as we electrify the economy. If we are to hit 2050 targets, we need to increase our installed capacity of energy generation from 75 GW to 250 GW.* ”

Sustainable Energy

The opportunity

Portfolio company Ørsted A/S (“Orsted”) provides energy products to its customers and develops, constructs and operates windfarms, solar farms, energy storage facilities, and bioenergy plants.

Investment Pillar	Investment Universe
Investment Pillar Alignment	Sustainable Energy
UN Global Compact	Orsted is a signatory of the UN Global Compact.
UN SDG Alignment	Alignment with SDGs 6, 7, 8, 9, 12, 13, 15

Overview

- In 2021, Orsted was **ranked by #1 by Corporate Knights** in its Index of the Global 100 most sustainable corporations in the world.
- The Company is committed to taking a leading role in how the world produces and consumes energy.
- All Orsted’s work is informed by **a strategic commitment to the UN SDGs and the UN Global Compact.**
- Over the past decade, Orsted has transformed itself from one of Europe’s most carbon-intensive companies into a global green energy leader.
- The Company’s carbon reduction targets are aligned with metrics necessary to limit the increase in global temperatures to 1.5C . The Company is on track to be **carbon neutral by 2025** and to have a net zero carbon footprint by 2040.



Sustainable Food, Land and Forestry

The challenge

“Food, agriculture, and land use are amongst the biggest contributors to climate change with roughly 24% of green house gas (GHG) emissions stemming from these practices. Electricity generation and land use and agriculture are basically equal in terms of their impact on climate change. Yet addressing GHG emissions from electricity generation and other sections usually gets far more attention.

Sustainable Food, Land and Forestry

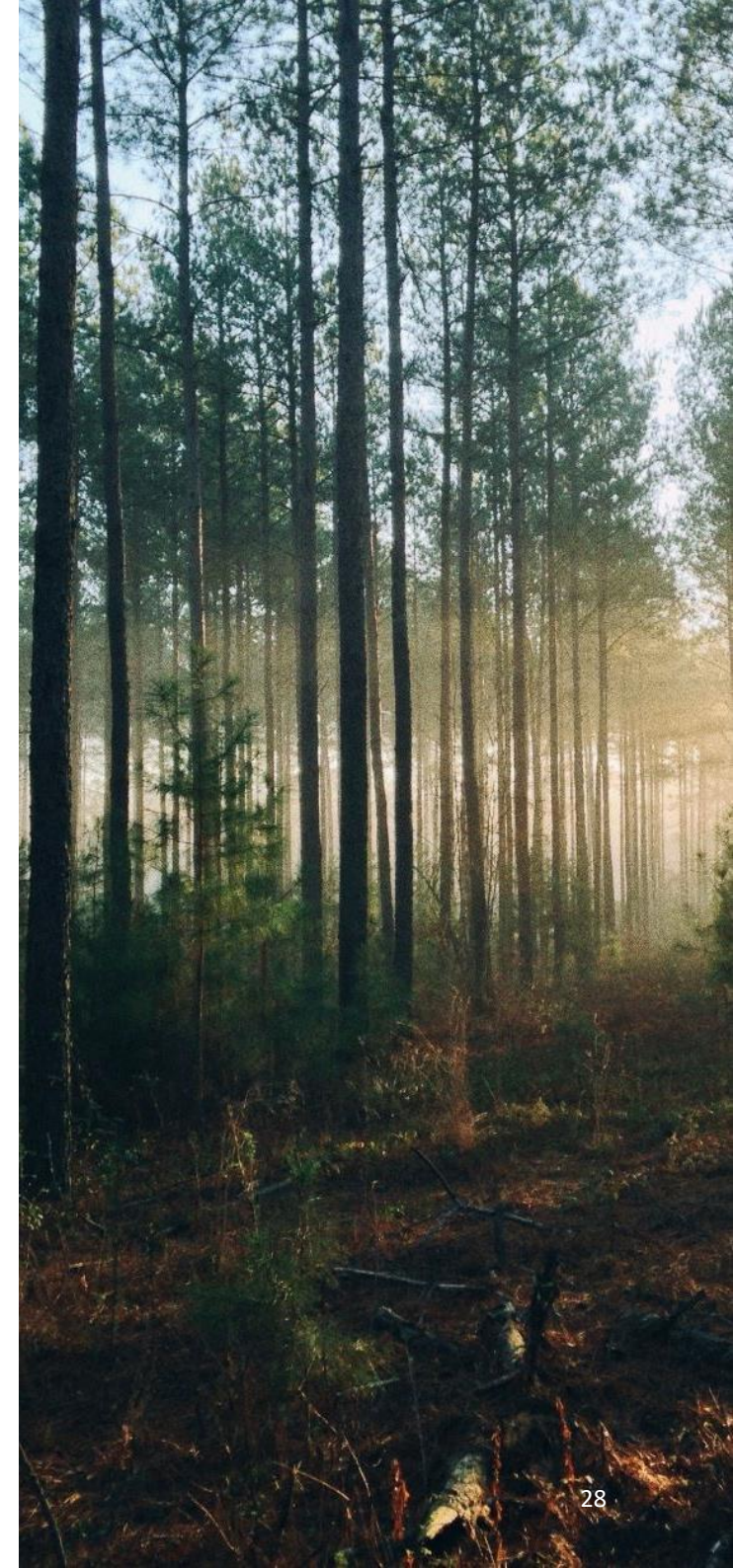
The opportunity

Portfolio company Rayonier Inc (“RYN”) is a timberland REIT which owns, operates, and leases timberland. The Company owns approximately 2.7 million acres across the US and New Zealand.

Investment Pillar	Investment Universe
Investment Pillar Alignment	Sustainable Food, Land, & Forestry
UN Global Compact	RYN complies with all 10 of the UN Global Compact principles
UN SDG Alignment	Alignment with SDGs 3, 6, 7, 13, 15

Overview

- RYN **owns approximately 2.7 million acres of timberlands** based in the US South (1.73 million acres), the U.S. Pacific Northwest (500,000 acres), and New Zealand (400,000 acres).
- RYN’s forests grow timber which is primarily sold wholesale to wood product manufacturers and saw mills.
- RYN is committed to **responsible environmental stewardship** and takes careful measures to ensure the long-term sustainability of their timberlands and the ecosystems they contain.
- The Company has a progressive and proactive approach to community involvement and engages with the communities within which they live and operate.
- RYN’s 2.7 million acres of timberland are managed to **sustainable forestry certification standards**. This compliance is periodically evaluated.



Sustainable Waste, Water and the Circular Economy

The challenge

“ *The organisation Circle Economy has found that only 8.6% of the economy is currently circular.* ”

Sustainable Waste, Water and the Circular Economy

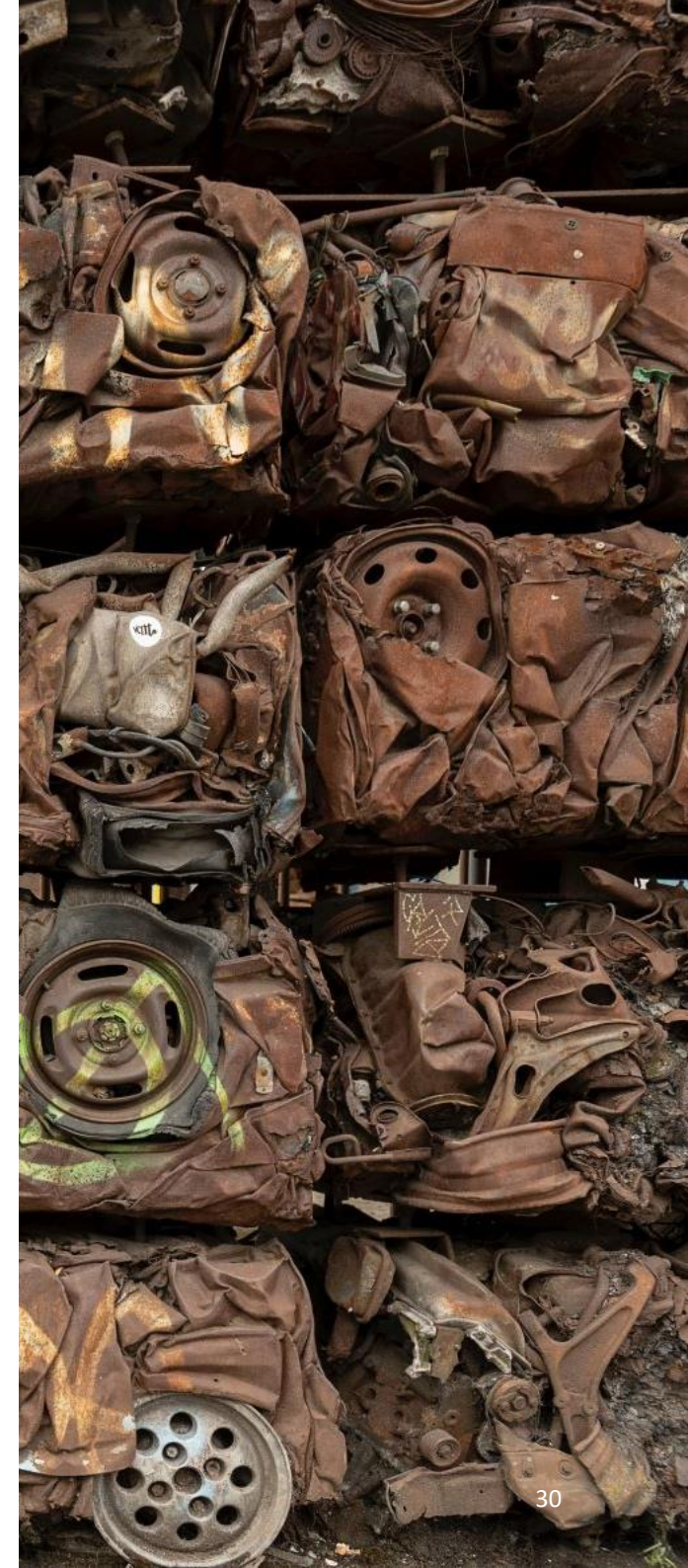
The opportunity

Portfolio company Sims Limited (“SGM”) is a global leader in metal and electronics recycling, and an emerging leader in the municipal recycling and renewable energy industries.

Investment Pillar	Investment Universe
Investment Pillar Alignment	Waste, Water, & The Circular Economy
UN Global Compact	SGM complies with all 10 of the UN Global Compact principles
UN SDG Alignment	Alignment with SDGs 6, 12, 13

Overview

- SGM’s purpose is **to create a world without waste**. The Company seeks to innovate and offer new solutions in the circular economy for consumers, businesses, governments, and communities around the world.
- Reducing waste and **keeping resources in use** for as long as possible is the basis used to develop SGM’s sustainability strategy.
- Each year, SGM helps **divert millions of tonnes of secondary materials from landfills**. These discarded materials are sorted and then refurbished, parts harvested, or recycled to make new products.
- SGM’s services include **metal recycling, electronic lifecycle services, municipal recycling, resource renewal, and renewable energy generation**.
- In 2021, SGM recycled 8.6m tonnes of secondary metals, processed 660,000 tonnes of municipal waste, and repurposed 2.1m cloud units.



“ *Between 2030 and 2050, 250,000 additional deaths per year could be expected from climate change through a combination of heatwaves, child undernutrition from decreased food availability, and the increased prevalence of diseases like dengue fever and malaria.* ”

Health and Education

The opportunity

Portfolio company Bright Horizons Family Solutions (“BFAM”) focuses on providing childcare and early childhood education services through employer sponsored partnerships across the US and Europe.

Investment Pillar	Investment Universe
Investment Pillar Alignment	Health and Education
UN Global Compact	BFAM complies with all 10 principles of the UN Global Compact
UN SDG Alignment	Alignment with SDGs 4 and 8.

Overview

- BFAM operates approximately **1000 early education and childcare centres** across the US and Europe and serves more than 1,300 of the world’s leading employers.
- The Company’s early education and childcare centres, back-up child and elder care, and workforce education programmes help employees succeed at each life and career stage.
- BFAM impacts against SDGs 4 and 8 through its **provision of high-quality educational centres** for children at all levels of their education, with its centres, back-up care, and enhanced family support services also ensuring that primary carers (which are overwhelmingly women) can **stay in their corporate jobs**.



“ *Almost 50% of the world's population does not currently have access to the internet.* ”

Digital World

The opportunity

Portfolio company Equinix Inc (“EQIX”) owns a global portfolio of data centres consisting of over 200 assets spread across 26 countries and 5 continents.

Investment Pillar	Investment Universe
Investment Pillar Alignment	Digital World
UN Global Compact	EQIX complies with all 10 principles of the UN Global Compact
UN SDG Alignment	Alignment with SDGs 6, 7, 9, 12, and 13.

Overview

- EQIX has best-in-class sustainability credentials:
- Achieving more than **90% renewable coverage** for global data centre energy consumption.
- Pursuing **science-based targets**.
- **Issuing green bonds** committing funds to green buildings, energy efficiency, and water consumption.
- **EQIX designs, builds, and operates sustainable data centres** planned holistically to reduce their consumption of all resources.
- Since 2011, the Company has **invested more than \$130 million** in energy efficiency upgrades, retrofits and improvements, with other capital allocated to reducing energy consumption within data centres.



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