

18 October 2023

Worthstone/Collidr partner on Sustainable MPS portfolios

- **Wellth Portfolios to offer “transparent and authentic” sustainable investment options, using the complementary technologies of Worthstone and Collidr**

Worthstone, the sustainable investment specialist, has selected Collidr to manage the Wellth Sustainable Investment Portfolios. The portfolios are offered currently to end investors through more than 10 adviser firms and growing.

As part of the collaboration, Collidr will manage the current range of four portfolios, which use Worthstone's proprietary technology and screening techniques to shortlist funds. Collidr will then apply its own 'Quantimental' investment approach, which applies behavioural research and AI-driven technology to screen and select funds suitable for each portfolio. Collidr will then manage the portfolios' ongoing performance.

Collidr was chosen for this role for three key reasons:

1. Its comprehensive approach to ESG and sustainability research, asset allocation and fund selection over the last 13 years, which utilises institutional portfolio construction tools. This complements Worthstone's sustainable investing methodology, so that portfolios at their core are driven by sustainability objectives as well as financial goals.
2. Its institutional approach to sustainability and long term partnerships that support advisory firms in delivering solutions.
3. Its market-leading risk management and interactive reporting capability, which allows IFAs to spend more time with clients. This is particularly important in light of the FCA's new Consumer Duty which has sharply increased the compliance burden on advisers.

Collidr's capabilities complement those of Worthstone. Worthstone applies its own proprietary research and technology to screen funds across six sustainable metrics, to build a 'shortlist' of funds that meet its sustainable criteria. Those metrics include:

1. **Positive impact**
2. **Active agency**
3. **Harm avoidance**
4. **ESG principles**
5. **Carbon risk**
6. **Paris alignment**

Founded in 2010, Worthstone was the first independent provider of investment sustainability ratings in the UK. A certified B Corp, Worthstone differs from the majority of sustainability ratings providers by not taking any payment from fund managers for licensing of its ratings. It covers the whole of the retail fund market in the UK, making it a vital resource for IFAs and wealth managers.

Uniquely, Worthstone's analysis of fund sustainability includes the entire supply chains of all of a fund's underlying investments, as well as the sustainability performance of the fund manager. This gives investors a much more accurate understanding of the sustainability of the funds they are invested in.

Collidr says that sustainable investing will continue to be a focus for investors, and advisers in turn. Sustainable funds worldwide have now exceeded \$2 trillion in assets, with by far the largest allocation in Europe*.

With the FCA's Sustainability Disclosure Requirements final guidelines due by the end of the year, it will become even more important for IFAs and wealth managers to make sure the portfolios they offer as 'sustainable' are accurately described. They risk penalties if the claims they make are deemed to be 'greenwashing' by the regulator.

Symon Stickney, CEO of Collidr, says: "We're delighted to be partnering with Worthstone. We each bring best-in-class technology to the table – that means advisers and their clients get access to the most transparent and user-friendly sustainable portfolio service on the market."

Gavin Francis, CEO and founder of Worthstone, added "We're proud to be part of a service that offers authentic sustainable portfolios to investors."

"This is a very exciting development in the evolution of Wellth's Sustainable Investment Portfolios. Collidr is a significant provider of model portfolios to the UK intermediary market. The combination of our capabilities provides a market leading product to advisers and investors looking for sustainable investing solutions. We believe that authentic sustainable portfolios providing transparency and dynamic reporting will be attractive to many advisers."

"We expect to continue to see rising demand for sustainable investing over the coming years, especially from younger investors. Many UK retail investors are looking for an attractive, accessible and liquid route to invest in multi asset portfolios that balance financial returns with delivering a positive impact for society and the environment."

* Statista, published 13 June 2023

ENDS

About Worthstone

Worthstone is an independent B Corp. For over a decade, they've been helping financial advisers walk the talk. Why? Because done right, sustainable investment means returns for everyone.

Through their online database, Worthstone's comprehensive rating system examines all aspects of sustainable investment giving advisers the full picture so they can make sure their clients' money is doing exactly what they'd intended.

Worthstone hosts the annual **Impact Investment Academy**, an annual event bringing together world-class influencers and industry leaders, providing thought provoking talks, insight and best practice. This year's theme is **Agents of Change**. To find out more, and to book a spot, visit: <https://worthstone.co.uk/impact-investment-academy/>.

For more information or to arrange a briefing/interview with Gavin Francis, please contact Gemma De La Rue on gemmadelarue@worthstone.co.uk and 07920 533483.

About Collidr

Launched in 2010, Collidr's operations include an investment management firm, Collidr Asset Management Limited, which is authorised and regulated by the Financial Conduct Authority and uses Collidr's proprietary AI technology, and Collidr Technologies Limited, which offers this technology on a stand-alone basis, in addition to research services, empowering investors to make better investment decisions and digitalise the investment process.

Collidr believes every investor would benefit from a disciplined, systematic approach to managing their investments, one that leverages intelligence-led technology every step of the way.

In addition, Collidr Asset Management Limited offers bespoke model portfolios.

Partnering with trusted advisers, Collidr's technology and services are available to: Financial Advisors, Wealth Managers, Actuarial Consultants, Private Banks, Life Companies, Pension Scheme Advisors / Providers, Asset Managers, Discretionary managers, Family Offices.

Collidr technology powers global client assets of c£7+ billion.

Press contact

Richard Crossan or Nick Mattison
Mattison Public Relations
Tel: + 44 (0)20 7645 3636