


How we consider sustainability factors when we decide where to invest your money

Sustainability issues bring financial risks and opportunities

Sustainability issues, climate change and the move to a low-carbon future, bring financial risks and opportunities. That's why we consider these factors when we decide where to invest your money. We can also influence companies to reduce their impact on people and the planet.

This fund does not have a sustainability label. The reason for this is that the investment preferences of the consumers of this fund does not include a specific sustainability objective.

 Sustainability investment labels help investors find products that have a specific sustainability goal.

Useful information about this Fund

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| Managed by: Phoenix Unit Trust Managers | Launched on: 25/03/2013 |
| Fund name: PUTM Bothwell Tactical Asset Allocation Fund | Fund identifier: FCA PRN Reference - 584406 |



Sustainability Approach

We screen out and exclude companies that could present a financial risk

This fund aligns to our 'Investment Exclusions Policy' which outlines key areas where we will not make additional investments and sell existing holdings. The investment exclusions are across all assets where we have direct control or influence of the investment mandate or solution.



Sustainability Metrics

We monitor portfolio exclusions and compliance with our Investment Exclusion Policy:

Details of our exclusion policy can be found [here](#).

We monitor and update our exclusion policy regularly and have processes in place to ensure the fund remains aligned. The fund is fully compliant with the exclusion policy and there are no exceptions.

This report has been published on 31/03/2025 using the most up to date information.

Please note: Certain Environmental, Social and Governance (ESG) data is reported on an annual basis and therefore carries a different date to the holdings data, which can be challenging when assessing a company's sustainability profile at a specific point in time.

Further Details

Find further details of this fund:



Fund prospectus
Available on request



Key Investor Information Document
Available on request



Fund Climate Report
Available [here](#)