thesharecentre:

press release

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Fund in Focus: Ecclesiastical Amity International fund

Andy Parsons, head of investment research at The Share Centre, explains why the Ecclesiastical Amity International fund has been added to our preferred list of funds, the Platinum 120, and what the benefits are for investors.

“There are an increasing number of issues that influence investment choice and for many the desire for good returns often overtakes any moral principles.

“However, because we believe the Ecclesiastical Amity International fund could allow investors to achieve long term returns and satisfy any moral concerns they may have we have added it to out preferred range of funds.

“The fund is considered a pioneer within the Socially Responsible Investing (SRI) arena. It focuses on companies that offer value and subjects potential investments to positive and negative screens.

“The fund invests in companies that make a positive contribution to society and the environment through sustainable and socially responsible practices. Investors can be assured that through a positive and negative screening process, the fund will only invest in companies the manager truly believes will offer the best long term opportunities within its strict investment mandate.

“The negative screen relates to certain areas that many ethical investors like to avoid, including companies, which operate in alcohol related sectors, gambling, pornography, strategic armaments, and tobacco, as well as animal testing and intense farming. The positive screen checks for compliance with broader conditions and will examine such issues as corporate governance, human rights, labour relations, community relations, education and healthcare.

"All the investment ideas are initially generated by the fund manager, who undertake their due diligence and continuing financial analysis of a company, the idea is then shared with the SRI team who have the responsibility to undertake the screening element. In terms of performance, the fund has a strong cumulative record over five years and three years respectively. Over the five year period, it has returned 43.64% compared to a sector average of 8.73%, ranking it first quartile and 7th out of 163 funds. On a three year cumulative performance, it has returned 43.01% compared to the sector average of 39.73%, ranking it second quartile and 80th out of 202 funds."

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Note to editors:

About The Share Centre's Platinum 120 range:

The Share Centre launched its Platinum 120 funds range in June 2009 in order to help investors identify the funds with the best long-term prospects and strong management. Customers who invest in a Platinum 120 fund will benefit from no purchase commission on all funds and no initial charge on almost 90%. Please visit www.share.com/p120 to view the full Platinum 120 range. Please be aware this may require registration.

Notes to editors:

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The bases and levels of taxation relating to ISAs, CTFs and SIPPs are subject to change and the value of these tax allowances may depend upon the circumstances of the individual.

About The Share Centre:

The Share Centre was established in 1990 to provide value-for-money share services for private investors. Its range of services includes buying and selling shares (by Internet, telephone and post) and a comprehensive share administration and safe custody service. Tax-efficient investment 'wrappers' including ISAs, CTFs and SIPPs are also available.

The Share Centre's Advice team provides comment on market sectors, individual shares and funds on www.share.com. Access is available to customers and registered users of the site. Registration is free. To understand how our Advice team arrive at their views please read our Investment Research Policy

In addition, account customers can receive individual telephone advice on UK-listed shares and on funds traded via the CoFunds trading platform.

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