

Fusion ESG

H5 | Sterling

Key Data

Minimum Initial Investment:
£100,000 or currency equivalent.

Currencies available:
GBP, USD, EUR

Approximate Ongoing Charges Figure (OCF): 1.3%

Investment Manager:
Sean Mills CFA

Investment Time Horizon:
5+ Years

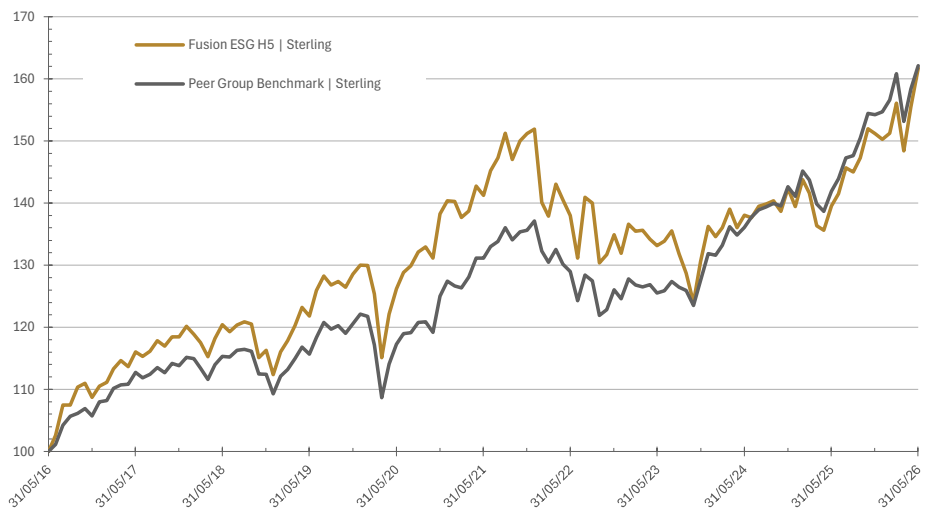
Strategy Overview

The Fusion ESG strategy uses a core and satellite approach of active and passive ESG exposures. The strategy contains active global equity, bond, and alternative managers who have experience managing sustainable mandates in combination with passive broad market indexes that utilise ESG screening to grant broad market exposure with ESG tilts. Asset allocation is aligned to our Fusion Alpha H5 model strategy.

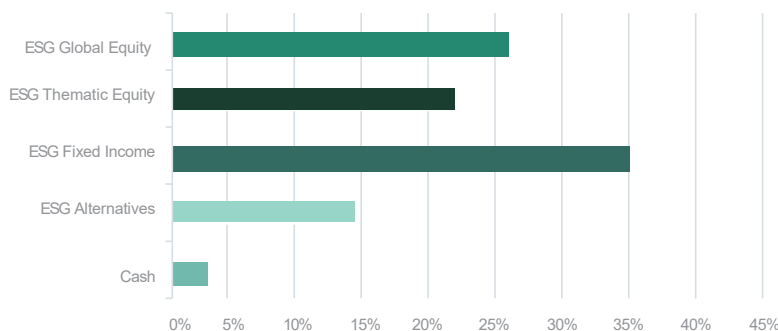
Sterling Performance*

	Fusion ESG H5	Peer Group Benchmark
1mth	4.0%	2.3%
3 mths	3.6%	0.8%
6 mths	7.0%	5.1%
1year	15.9%	14.2%
3 years	21.5%	29.1%
5 years	14.5%	23.6%
10years	61.7%	62.1%

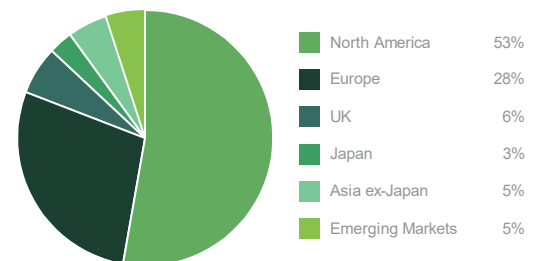
*Fusion ESG H5 Sterling performance is net of fees and is compared to a Peer Group Benchmark.



Asset Allocation



Geographical Equity Asset Allocation



capital-iom.com

t +44 (0) 1624 654200 e businessdevelopment@capital-iom.com

This document has been prepared for information purposes only, is believed to be correct as at the issue date hereof, but its accuracy cannot be guaranteed. Information in this document does not constitute investment advice or an offer or an invitation by or on behalf of any company within the Group to buy or sell any product or security or to make a bank deposit. Any reference to past performance is not necessarily a guide to the future. The value of investments may go down as well as up and may be adversely affected by currency fluctuations. The Group, its subsidiary companies, clients, and officers may have a position in, or engage in transactions in any of the investments mentioned. Opinions constitute views as at the date of issue thereof and are subject to change.

Issue Date: 08/01/2026

Ref: FEFSv1

Capital International Limited is a subsidiary of Capital International Group Limited and is licensed by the Isle of Man Financial Services Authority. Capital International Limited is a member of the London Stock Exchange. Capital International, Capital International Asset Management, and Capital International Investment Platform are trading names of Capital International Limited.

**Create Tomorrow.
Start Today.**

 Do you really need to print this? We are serious about climate change & biodiversity loss. For more information, please [click here](#).