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Assets	GBP	696,081,876	31-Mar-23	Currency	GBP	Pound Sterling
Type:	Ecology			Domicile:	UK	
Structure:	Investment Trust (open ended)			Inception_Date:	01-Apr-88	
Performance Fee	none					
Benchmark	FTSE ET 100 IA Global Sector					

Investment Philosophy and Objective

The objective of the Fund is to provide capital growth with the prospect of income, over the long term (at least five years) by investing in companies whose core products and services address global sustainability challenges.

At least 70% of the Fund is invested in shares of companies based anywhere in the world whose core products and services address global sustainability challenges. Up to 30% of the Fund may be invested in other assets, including shares of other companies, open-ended funds (including funds managed by Jupiter and its associates), cash and near cash. Companies must meet both a comprehensive financial assessment and environmental and social criteria including looking at a full range of ethical exclusions.

Portfolio Manager **Mr. Jon Wallace** MSc B.Econ jon.wallace@jupiteram.com



Jon Wallace is Investment Manager, Environmental Solutions. He manages the Jupiter Ecology Fund (Unit Trust); its Sicav version the Jupiter Global Ecology Growth Fund; and the Jupiter Green Investment Trust. He also co-manages the Jupiter Global Ecology Diversified Fund (Sicav) with Rhys Petheram.

Before joining Jupiter, Mr. Wallace worked at Forum for the Future, a non-profit organisation that works in partnership with business, government and civil society to accelerate the shift toward a sustainable future. He began his investment career in 2009.

Start Date
28-Feb-21

Jon has a BA in Economics and History and an MSc in Environmental Technology.

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MSc Masters of Science
B.Econ Bachelor of Economics

Portfolio Manager **Ms. Noelle Guo** CFA® M.Fin B.Econ noelle.guo@jupiteram.com



Noelle Guo joined Jupiter Asset Management in 2021, prior to which she had been an investment analyst with Pictet Asset Management. Ms. Guo began her investment career in 2013 and has also worked as a Senior Research Associate with AB Bernstein.

Noelle has a degree in Economics (Finance and Banking), as well as a Masters Degree in Financial Economics. Noelle is also a CFA charterholder.

Start Date
01-Feb-21

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B.Econ Bachelor of Economics

Investor Relations *** contact not recorded** [email](#)