



# IMPORTANT INFORMATION REGARDING THE OLD MUTUAL WEALTH ESG RATINGS

Old Mutual Wealth hereby confirms that ESG Ratings have been temporarily removed from all funds' Mandatory Disclosure Documents (MDDs) on our platform, whilst we urgently review our approach to the rating of funds. This decision was driven by a change in MSCI's ESG Ratings methodology and increased costs.

## **Old Mutual Investment Group**

We anticipate that ESG ratings scores for unit trust funds managed by Old Mutual Investment Group will be available from October 2024. Old Mutual Investment Group will continue to rate its funds using the MSCI methodology. These ESG ratings will apply exclusively to the listed equity holdings.

## **Other Fund Managers**

Unit trust funds managed by Old Mutual Multi-Managers (including SIS funds), Adviceworx, Futuregrowth and Jupiter are under full review and will no longer receive ESG ratings from Old Mutual Wealth until the review mentioned above is concluded.

**Old Mutual Wealth**  
**October 2024**

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**WEALTH**

Old Mutual Wealth is an elite service offering brought to you by several licensed FSPs in the Old Mutual Group.