# Indigo Trust - Investment Policy Summary

The Trust invests its funds responsibly to support its long-term charitable mission. Our investment approach aims to preserve and grow our endowment over time so that we can continue making grants and delivering lasting impact.

## Our investment objectives

- Generate sustainable long-term returns while protecting capital.
- Support the Trust's ongoing grant-making and operational activities.
- Balance financial performance with positive social and environmental outcomes.
- Invest in a way that reflects our charitable values.
- We seek investment returns that exceed inflation over the long term while maintaining sufficient liquidity to meet our commitments.

## Responsible investment

- Responsible investment is central to our approach. We expect our investment managers to integrate Environmental, Social and Governance (ESG) considerations into investment decisions and actively engage with companies to encourage responsible business practices.
- Our investment philosophy is guided by avoiding harm, supporting positive social and environmental outcomes, encouraging good corporate governance and supporting the United Nations Sustainable Development Goals where appropriate.

## Investment restrictions

- We do not invest in businesses that derive significant revenues from indiscriminate weapons and armaments, tobacco, fossil fuel extraction and production, gambling, pornography, high-interest rate lending or human embryonic cloning.
- We also apply restrictions to alcohol companies unless they demonstrate responsible industry practices. These exclusions are reviewed regularly.

## How our investments are managed

- The Board of Trustees oversees the investment strategy, supported by an Investment Committee. Day-to-day portfolio management is delegated to a professional investment manager operating within agreed guidelines.
- Our investments are diversified across a range of asset classes and geographic regions to manage risk and support long-term growth.

## Monitoring and review

- Investment performance is reviewed regularly against agreed objectives and benchmarks. The Investment Committee meets the investment manager twice a year to review performance and responsible investment practices.
- The Investment Policy is reviewed annually and updated when necessary to reflect changes in priorities, market conditions and regulation.