

INVESTMENT OBJECTIVE

The ESG & Clean Energy portfolio seeks long-term capital appreciation while directing capital toward companies aligned with environmental, social, and governance principles. It invests across ESG-screened equities in developed and emerging markets alongside clean energy infrastructure, electric vehicles, smart grids, water technology, and nuclear energy. The portfolio carries a high risk profile given its thematic concentration and is suited to investors with a high risk tolerance and a long investment horizon who want to grow wealth in line with the global transition toward a more sustainable economy.

MONTH IN REVIEW

ESG & Clean Energy rose +2.04%, led by uranium holdings as utilities raced to lock in long-term supply and contract prices rose. Clean-energy names were the drag, with solar firms facing shifting US tariff policy and elevated borrowing costs weighing on capital-intensive projects.

RETURNS

Avg. Annualised Return (5 years)

Risk Rating

3.98 % p.a.

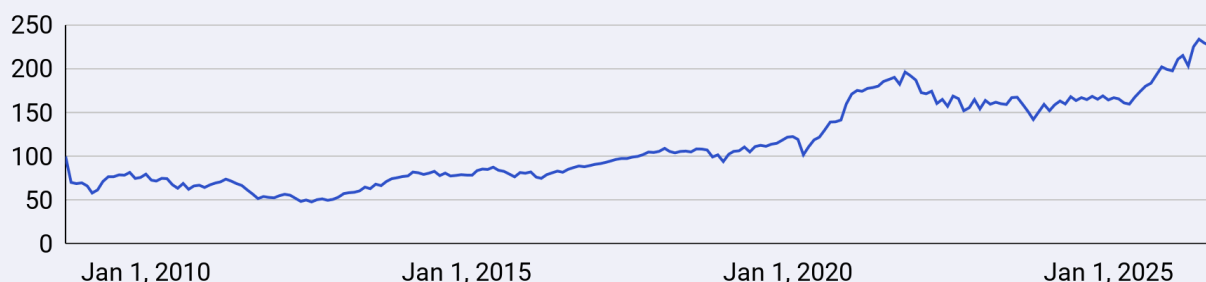
● ● ● ● ● **5 / 5 • High**

KEY FACTS

Asset Class	Equities	Recommended Horizon	2-5 years
Inception Date	31 March 2021		

PERFORMANCE (GROSS RETURNS)

ESG & CLEAN ENERGY

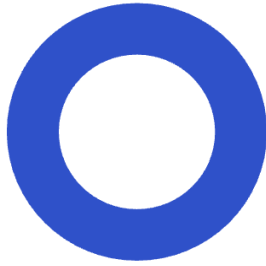


Past returns are shown for illustrative purposes only. They are calculated before fees and in SGD terms unless otherwise specified. The past returns since inception (6 August 2021) are based on model portfolio returns which may not fully account for trading costs, tax implications and timing impacts. Past returns prior to portfolio inception date are based on our internal backtested data with information obtained from underlying fund managers. Past returns are not a guarantee for future performance. - Data through August 2026

ANNUALISED (%)

	YTD	1Y	3Y	5Y
● ESG & Clean Energy	17.02%	26.00%	13.17%	3.98%

ASSET CLASS

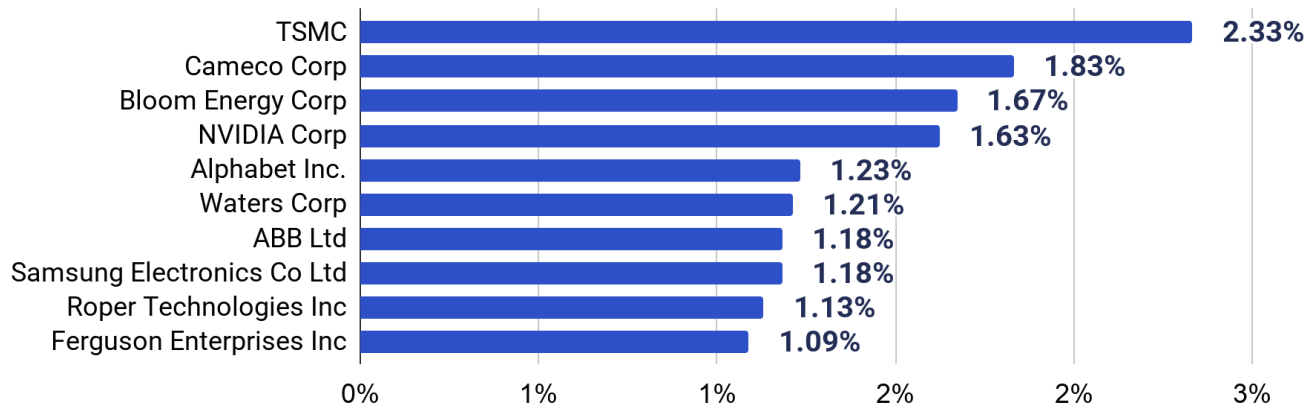


● Equities 100%

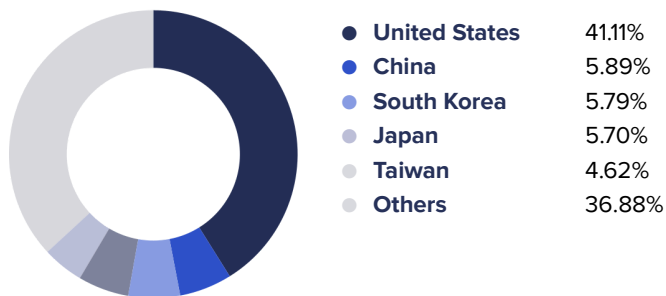
ETF COMPOSITION (%)

ESGD	iShares MSCI EAFE ESG	16.34%
ESGE	iShares MSCI EM ESG	15.55%
ESGU	iShares MSCI USA ESG	14.37%
PHO	Invesco Water Resources	13.09%
GRID	First Trust NASDAQ Clean Edge Smart Grid Infrastructure	12.30%
DRIV	Global X Autonomous & Electric Vehicles	10.19%
ICLN	iShares Global Clean Energy	10.07%
URA	Global X Uranium ETF	8.09%

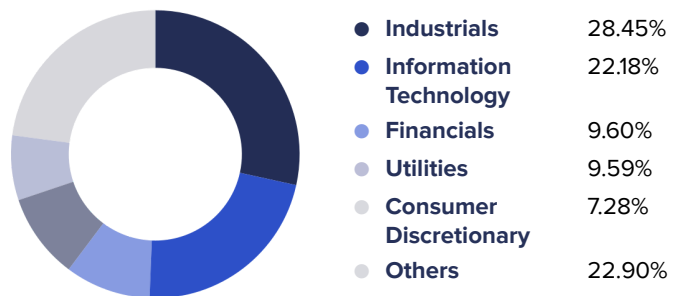
TOP 10 HOLDINGS | WEIGHTAGE (%)



COUNTRIES (%)



SECTORS (%)



For guidance on fund allocation, please contact our advisory team at advisory@syfe.com. Sharpe ratio and Standard Deviation measured from April 2013.

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