

## PRESS RELEASE

30th November 2021

### Copia Capital Management announces agreement with MSCI to provide independent ESG Fund Ratings for all portfolios

London, 30<sup>th</sup> November 2021 – Discretionary Fund Manager [Copia Capital Management](#) has announced that it has licensed MSCI ESG Fund Ratings for all its MPS Custom and ‘ready to go’ MPS portfolios. MSCI ESG Fund Ratings are designed to measure resilience to long-term environmental, social and governance (ESG) risks and MSCI is recognised as a leading provider.

A pure B2B discretionary fund manager (DFM), Copia works exclusively with advisers to provide a range of managed portfolio services, and MSCI’s ESG Fund Ratings have been introduced in response to demand from advisers and their clients.

Copia Managing Director Robert Vaudry said “ESG is becoming increasingly important to investors and to their advisers and the impact of COP26 will inevitably accelerate this trend. Copia is committed to responsible investing and our relationship with MSCI will ensure that all our portfolios are independently benchmarked by the leading research company in this area. We believe this relationship strengthens our DFM proposition even further, adding objective ESG-rating of our portfolios to our bespoke portfolio services, tailored to advisers’ needs, and competitive value.”

MSCI ESG Fund Ratings aims to provide fund-level transparency to help clients better understand and measure the ESG characteristics of a total portfolio, and rank or screen funds based on a diverse set of ESG exposure categories.

Each fund or ETF scores a rating on a scale from CCC (laggard) to AAA (leader). The rating is based first on the weighted average score of the holdings of the fund or ETF. MSCI then assesses ESG momentum to gain insight into the fund’s ESG track record, which is designed to indicate a fund’s exposure to holdings with a positive rating trend or worsening trend year over year.

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#### NOTES FOR EDITORS

Launched in 2013, [Copia Capital Management](#) is the award-winning investment solutions division of [Novia Financial plc](#). A pure B2B discretionary fund manager (DFM), Copia works exclusively with advisers to provide a range of managed portfolio services. These include its MPS Custom service,



offering bespoke portfolios to advisers which are constructed to meet the adviser's retail clients' needs; its 'ready to go' MPS portfolio products; and the added-value MPS Plus range.

#### **ENQUIRIES**

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