

PRESS RELEASE

**The WS Montanaro Better World Fund
to adopt the ‘Sustainability Impact’ label**

12 June 2025

We are delighted to announce that the WS Montanaro Better World Fund will adopt the “Sustainability Impact” label under the Financial Conduct Authority’s (FCA) Sustainability Disclosure Requirements (SDR) regime.

The WS Montanaro Better World Fund becomes one of a select group of actively managed, listed equity funds to adopt the label. It reflects Montanaro’s long-term commitment to sustainable investing and reinforces its position as a pioneer in the field.

The Fund, managed by Adam Montanaro, is aligned with six long-term impact themes: Environmental Protection, Green Economy, Healthcare, Innovative Technology, Nutrition and Well-being. The strategy invests with the primary objective of achieving a pre-defined, positive and measurable sustainability impact alongside a financial return.

Ed Heaven, Chief of Staff and Head of Sustainable Investments said: *“This label recognises the rigour of the Better World Fund’s impact process and our focus on intentional, measurable outcomes. We believe Small & MidCap equities offer one of the most effective routes for investors seeking to deliver real-world impact through public markets, combined with financial returns.”*

Cedric Durant des Aulnois, CEO, said: *“As a B Corporation, adopting the label is another important step for Montanaro. We believe that the UK’s SDR - if implemented effectively - has the potential to become a global benchmark for credible, transparent and ambitious sustainable investing.”*

An updated version of the Fund’s prospectus will be published in due course, with the effective date for the label set as 30 June 2025.



About the WS Montanaro Better World Fund:

Launched in January 2020, the WS Montanaro Better World Fund invests in quoted, global Small & MidCap companies providing solutions to pressing environmental and social problems. The Fund is invested in companies making a positive impact on society or the environment, underpinned by a rigorous, proprietary impact assessment framework. A Dublin-domiciled Montanaro Better World Fund was launched in April 2018.

About Montanaro Asset Management (“Montanaro”):

Founded in 1991, Montanaro is one of the most experienced investment firms specialising in quoted Small & MidCap companies, with a team of 37 people. A certified B Corporation, Montanaro integrates ESG and sustainability into all of its investment strategies. The firm looks after c.£3 billion on behalf of leading institutional investors worldwide.

About the WS Montanaro Better World Fund

Investors can access the Fund via two Share Classes:

- GBP A Accumulation [ISIN: GB00BJRCFP12, SEDOL: BJRCFP1]
- GBP B Income [ISIN: GB00BMW2NP33, SEDOL: BMW2NP3]

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