

## AEI Vision and Mission

### Australian Ethical's Vision

By its operations Australian Ethical will promote a sea-change in community-wide practice such that all investment will be undertaken with an ethical purpose as well as in pursuit of competitive return for chosen risk.

### Australian Ethical's Mission

Short form

“for investors, society and the environment”

Long Form

Australian Ethical's mission is to provide those investors who share our social and environmental aims (as set out in our charter) with the means to earn a competitive return for chosen risk whilst at the same time contributing to a just and sustainable human society and the protection of the natural environment.

We avoid any investment which is considered to unnecessarily:

- (i) pollute land, air or waters;
- (ii) destroy or waste non-recurring resources;
- (iii) extract, create, produce, manufacture, or market materials, products, goods or services which have a harmful effect on humans, non human animals or the environment;
- (iv) market, promote or advertise, products or services in a misleading or deceitful manner;
- (v) create markets by the promotion or advertising of unwanted products or services;
- (vi) acquire land or commodities primarily for the purpose of speculative gain;
- (vii) create, encourage or perpetuate militarism or engage in the manufacture of armaments;
- (viii) entice people into financial over-commitment;
- (ix) exploit people through the payment of low wages or the provision of poor working conditions;
- (x) discriminate by way of race, religion or sex in employment, marketing, or advertising practices;
- (xi) contribute to the inhibition of human rights generally.

We seek out investments which provide for and support:

- (a) the development of workers' participation in the ownership and control of their work organisations and places;
- (b) the production of high quality and properly presented products and services;
- (c) the development of locally based ventures;
- (d) the development of appropriate technological systems;
- (e) the amelioration of wasteful or polluting practices;
- (f) the development of sustainable land use and food production;

- (g) the preservation of endangered eco-systems;
- (h) activities which contribute to human happiness, dignity and education;
- (i) the dignity and well being of non human animals;
- (j) the efficient use of human waste;
- (k) the alleviation of poverty in all its forms;
- (l) the development and preservation of appropriate human buildings and landscapes.

In order to fulfil our mission our goals are:

To select every investment with which we are involved in accord with the Australian Ethical Charter;

To earn a competitive return for the chosen level of risk upon every portfolio with which we are involved;

To conduct our own operations in accord with the items of the Australian Ethical Charter, in particular we seek to:

- (a) nurture staff participation and control of Australian Ethical;
- (b) achieve a high standard of administrative service for investors in our products;
- (e) ameliorate wasteful or polluting practices in our own business operations;
- (h) encourage, care for and provide educational opportunity for our fellow workers, respect their individual needs, aspirations and idiosyncrasies;

Avoid:

- (iv) by ensuring our promotional material is comprehensive, transparent and readily understood;

To generate and disseminate information regarding standards of corporate behaviour and to engage in dialogue with the corporate sector in terms of the items set out in the Australian Ethical Charter.