



U Ethical Australian Equities

Compounding good, one investment at a time

At a glance

U Ethical's Australian equities strategies are built to deliver long-term performance while contributing to a more inclusive and fair financial system. As a not-for-profit ethical fund manager, we reinvest our success into supporting communities — with over \$65 million contributed since 1995 through our partnership with the Uniting Church.

We call it compounding good, the idea that returns and responsibility can grow together.

Why it matters

For us, issues like financial inclusion and Indigenous rights aren't theoretical. They shape the real-world outcomes of the companies we invest in and influence long-term value.

We believe well-governed businesses that consider their broader impact are better placed to manage risk, protect their reputation, and adapt to change. Our role is to invest in those companies and to use our influence to encourage even better outcomes for people and planet.

Putting purpose into practice

Financial inclusion & First Nations advocacy

After ASIC's report on unaffordable bank fees for Aboriginal and Torres Strait Islander customers (REP 785), we engaged with the banks involved as equity and credit investors to understand their responses and advocate for stronger practices.

We're also engaging with Financial Counselling Australia's First Nations Network to better understand community needs and reflect those perspectives in our engagement. We want to see financial services that are fair, culturally respectful, and accessible to all.





Challenging predatory lending & gambling

We've spent more than a decade advocating for better protections for vulnerable Australians from campaigning against payday lenders and lease-to-own models, to encouraging stronger consumer safeguards.

We don't invest in companies that profit from gambling or predatory finance, and we work with likeminded investors, researchers, and advocacy groups to support better standards across the sector.

Stewardship that strengthens companies

We integrate social impact into every step of our process from screening and research to portfolio construction and engagement. We focus on companies that align with our values and our conviction that ethical, transparent businesses make more resilient long-term investments.

Key sectors we invest in



Financial services



Telecommunications



Consumer goods and retail

Core social themes we care about



Financial fairness and access



Indigenous inclusion and reconciliation



Good governance and board diversity



Human rights and modern slavery prevention

A not-for-profit with a purpose

We're proud to be one of Australia's original ethical investment managers and one of the few that's also not-for-profit. Our structure means more of our profits are directed to social initiatives, not shareholders.

We think that's a powerful model:

The better we do, the more we give

Investing that compounds good

Investing with U Ethical means your capital is working harder, not just for you, but for the world you want to see. Our Australian equities strategies are designed to deliver competitive performance and meaningful impact.

This is how we compound good, for investors, for communities, and for the future.

Please remember past performance is not a reliable indicator of future performance. Investments are subject to risk and may result in the loss of capital.

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