



Weekly Market Briefing

Week Ending 2025-09-15

Weekly Summary

This week's briefing highlights pivotal shifts impacting sustainable finance, from a potential recalibration of green energy priorities within Europe to the rising geopolitical influences on ESG investing. The renewed consideration of nuclear energy, coupled with EU efforts to attract green capital, may reshape investment strategies in the clean energy sector, potentially impacting the trajectory of renewable energy investments. Additionally, advancements in ocean data modeling offer enhanced due diligence capabilities for blue economy investments. Emerging market opportunities and the definition of "impact-first" investments are further addressed alongside a shift in ESG allocations towards defense, and cybersecurity underscoring the dynamic nature of sustainable investing in response to global events. Institutional investors must carefully evaluate these evolving trends and refine their investment strategies to effectively navigate the changing landscape.

Listed Fund Performance Summary

Fund data last updated: 2025-07-21 14:18:53

Smallest Discounts

Fund	Price	NAV	Discount
Downing Renewables & Infrastructure	£101.75	£112.36	-9.4%
Impax Environmental Markets	£386.50	£431.87	-10.5%
Greencoat UK Wind	£126.00	£150.00	-16.0%
Foresight Solar Fund	£91.40	£111.00	-17.7%
Renewables Infrastructure Group	£89.70	£112.70	-20.4%

Largest Discounts

Fund	Price	NAV	Discount
VH Global Energy Infrastructure	£71.80	£103.29	-30.5%
SDCL Efficiency Income	£57.00	£90.60	-37.1%
Gore Street Energy Storage Fund	£60.30	£102.80	-41.3%
Aquila Energy Efficiency Trust	£33.00	£85.55	-61.4%
HydrogenOne Capital Growth	£27.65	£89.28	-69.0%

1

EU court rules nuclear energy is clean energy

Source: Weplanet.org

Published: 2025-09-12T18:18:00Z

POSITIVE IMPACT

- **Shift in Nuclear Energy Perception:** The article suggests a growing acceptance or reconsideration of nuclear energy as a sustainable solution within Europe, potentially altering investment strategies in the clean energy sector.
- **Policy Implications & Investment Opportunities:** This shift could drive policy changes and create new investment opportunities in nuclear power generation and related infrastructure, influencing institutional investors' portfolio allocations.
- **Impact on Renewable Energy Investments:** Increased focus on nuclear might affect the trajectory of investments in other renewable energy sources, requiring institutional investors to reassess their diversification strategies.

Topic: Market Trends

Mentioned Companies: None

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2

Trends & Strategies Shaping the \$150+ Billion Investment Banking Market 2025-2029: Tech Integration and AI-Driven Solutions Reshaping Operations

Source: GlobeNewswire

Published: 2025-09-11T15:27:00Z

POSITIVE IMPACT

- **Market Growth Indication:** The investment banking market is experiencing strong growth, signaling potentially increased opportunities and returns for institutional investors within sustainable finance activities facilitated by investment banks.
- **Research Availability:** The availability of a detailed "Investment Banking Market Report 2025" provides institutional investors with valuable data and insights to inform their investment strategies and due diligence within the sustainable finance sector.
- **Strategic Planning Resource:** The report serves as a crucial resource for institutional investors to understand current market dynamics and plan for future investment decisions, specifically related to deploying capital towards sustainable and ESG-focused initiatives through investment banking channels.

Topic: Market Trends Mentioned Companies: None

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3

EU Financial Chief Sees 'More Appealing' Rules Luring ESG Money

Source: Financial Post

Published: 2025-09-11T09:41:09Z

POSITIVE IMPACT

- The EU financial services commissioner is prioritizing efforts to make the EU's financial regulations more attractive to investors.
- A key aim is to draw more green capital into the European Union.
- The initiative is aimed at boosting investment in sustainable finance within the EU.

Topic: Regulatory & Policy Mentioned Companies: None

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4

Inside a virtual ocean platform that could help with marine protection

Source: Phys.Org

Published: 2025-09-10T19:26:04Z

POSITIVE IMPACT

- **Enhanced Ocean Data & Modeling:** The creation of a "digital twin" of the ocean will provide institutional investors with significantly improved data and predictive modeling capabilities for assessing the environmental impact and sustainability of ocean-related investments. This can lead to better risk management and more informed allocation of capital in areas like sustainable fishing, offshore renewable energy, and marine conservation.
- **Improved Policy Impact Analysis:** The digital twin allows for simulations of policy interventions, giving investors greater insight into the potential effectiveness and financial implications of ocean-related regulations and conservation efforts. This enables more strategic engagement with policymakers and proactive adaptation to evolving regulatory landscapes.
- **Catalyst for Sustainable Innovation:** By providing a virtual platform for testing and experimentation, the digital twin is expected to spur innovation in sustainable ocean technologies and management practices. This creates opportunities for institutional investors to identify and support promising startups and initiatives in the blue economy, driving both financial returns and positive environmental outcomes.

Topic: New Technology

Mentioned Companies: None

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Source: Hospitality Net

Published: 2025-09-09T10:59:04Z

NEUTRAL IMPACT

- **Framework for "Impact-first" Investments:** The forum emphasized the need for a more rigorous and standardized framework to define and measure "impact-first" investments, signaling a push for greater transparency and accountability in sustainable investing. This is crucial for institutional investors seeking to allocate capital to truly impactful projects.
- **Collaboration is key:** The event highlighted the importance of partnerships between academic institutions, asset managers, and corporations to drive innovation and scalability in sustainable investing solutions. This implies opportunities for institutional investors to participate in collaborative research and development efforts.
- **Emerging market opportunities:** The forum explored the potential of sustainable investments in emerging markets as a driver of both financial returns and positive social and environmental outcomes, suggesting a potential shift in investment strategies for institutional investors seeking diversification and impact.

Topic: Market Trends

Mentioned Companies: Asteria Investment Managers

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When “Sustainable” Means Nuclear: ESG’s Surprising Pivot to Defense (Sergio Artimenia)

Source: Finextra

Published: 2025-09-07T09:57:24Z

POSITIVE IMPACT

- **ESG Investments Shifting Focus:** The article highlights a trend indicating a growing allocation of ESG investments away from traditional renewable energy projects and towards areas like defense and cybersecurity, driven by geopolitical concerns. This signifies a potential redefinition of what constitutes a sustainable investment.
- **Geopolitical Factors Influencing ESG:** The increasing emphasis on defense and cybersecurity investments within ESG portfolios demonstrates how geopolitical events are reshaping sustainable investing strategies. Institutional investors need to assess how these factors will impact their ESG frameworks and risk assessments.
- **Need for Enhanced ESG Frameworks:** The changing investment landscape underscores the need for more robust and adaptable ESG evaluation frameworks. Institutional investors must refine their methodologies to account for the evolving definition of "sustainable" in light of global events.

Topic: Market Trends

Mentioned Companies: None

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Source: www.gov.uk

Published: 2025-09-03T17:00:02Z

POSITIVE IMPACT

Here's a summary of the news article focusing on its relevance to institutional investors in sustainable finance:

- **Increased Job Creation from UK-Saudi Investments:** The announcement of over £360 million in UK-Saudi investments, expected to create 180 new jobs, alongside the broader £3.7 billion in deals generating 4,100 UK jobs, signals growing economic ties that could potentially open avenues for sustainable finance initiatives tied to job creation and local economic development.
- **Potential Alignment with ESG Goals:** Institutional investors may assess the potential for these new jobs and investments to align with Environmental, Social, and Governance (ESG) criteria. The focus will be on sectors involved and whether investments incorporate sustainable practices, contribute to positive social outcomes, or demonstrate strong governance.
- **Diversification and Risk Assessment:** The deals represent opportunities for diversification across sectors and geographies. However, institutional investors need to carefully assess the geopolitical risks and regulatory environments associated with UK-Saudi collaborations, ensuring investments adhere to responsible investment principles and international standards.

Topic: Market Trends

Mentioned Companies: None

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