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# Dimensional Funds PLC - Global Core Equity Lower Carbon ESG Screened Fund



Global developed market all caps equities with ESG carbon screening. Active quantitative strategy.

## Über den Fonds

Daten zum May 30th 2026

Dimensional Fund Advisors is a systematic/quantitative focused firm founded in 1981, and is reputable for translating interesting academic research into practical and profitable investment solutions.

The **Dimensional Global Core Equity Lower Carbon ESG Screened Fund** is an actively managed fund seeking to maximise long-term total return by primarily investing in global developed markets equities, with no market capitalisation constraints and with flexibility to allocate up to 20% in emerging markets.

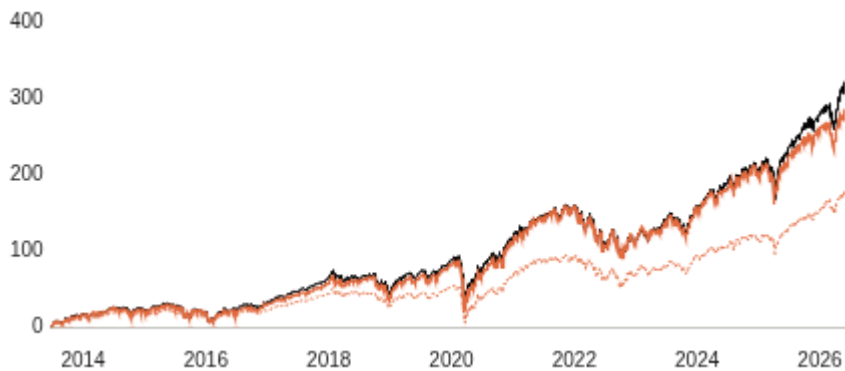
The fund adopts Dimensional's general equity selection approach to overweight in small value companies and underweight in large growth companies in its quantitative models. Stock selection is primarily based on financial metrics including price-to-book and price-to-cash flow, as well as economic conditions and developments in the stock's industry. Additionally, the fund aims to exclude or underweight top contributors to greenhouse gas emissions as well as issuers with high levels of potential emissions from reserves through ESG screening. The fund runs a highly diversified portfolio of >5400 holdings.

### Dimensional Funds PLC - Global Core Equity Lower Carbon ESG Screened Fund

|                                  |                              |
|----------------------------------|------------------------------|
| Anlagestil                       | Factor-based                 |
| Anlageklasse                     | <u>Global Equities - ESG</u> |
| Max. empfohlener Portfolioanteil | 70%                          |
| ISIN                             | IE00B8DMPF88                 |
| Anteilklasse                     | Acc USD                      |
| Ausschüttung                     | Thes                         |
| TER                              | 0.26% p.a.                   |
| Nachhaltigkeit (SFDR)            | Article 8                    |

## Wertentwicklung

### Preisentwicklung – Maximaler Zeitraum



#### Bausteinrenditen

##### Dimensional Funds PLC - Global Core Equity Lower Carbon ESG Screened Fund

|                                 |        |
|---------------------------------|--------|
| Ann. Rendite (3 J.):            | 19.83% |
| Ann. Rendite (5 J.):            | 9.80%  |
| Ann. Rendite (10 J.):           | 12.20% |
| Ann. Standardabweichung (5 J.): | 15.74% |

This fund represents active exposure to global developed markets all caps equities, with ESG carbon screening.

#### Benchmark-Renditen

##### SPDR MSCI All Country World UCITS ETF

|                                 |        |
|---------------------------------|--------|
| Ann. Rendite (3 J.):            | 22.50% |
| Ann. Rendite (5 J.):            | 11.44% |
| Ann. Rendite (10 J.):           | 12.76% |
| Ann. Standardabweichung (5 J.): | 14.46% |

[↗ Link zum Fonds-FairSheet](#)

#### FairHorizont-Benchmark-Renditen

##### Dimensional Funds PLC - World Allocation 80/20 Fund

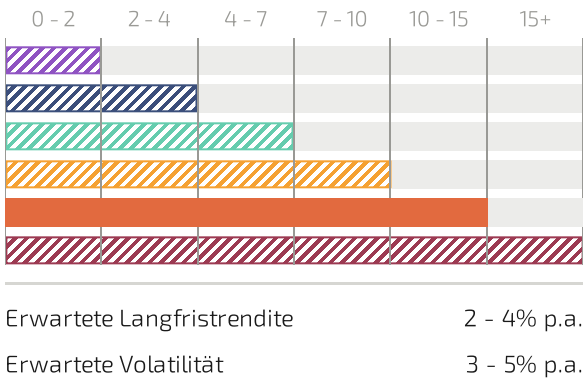
|                                 |        |
|---------------------------------|--------|
| Ann. Rendite (3 J.):            | 17.21% |
| Ann. Rendite (5 J.):            | 8.23%  |
| Ann. Rendite (10 J.):           | —      |
| Ann. Standardabweichung (5 J.): | 12.49% |

[↗ Link zum Fonds-FairSheet](#)

The **Dimensional World Allocation 80/20 Fund** is our **FAIRHORIZON Orange** reference benchmark solution that has 80% global developed equities and 20% global investment grade short-to-medium maturity bonds for global defensive equity-like returns and volatility.

## Das FairHorizont-Konzept

### Anlagezeithorizont in Jahren



Warum wir diesen Fonds bevorzugen

Relevance of strategy

This fund represents active exposure to global developed markets all caps equities, with ESG carbon screening.

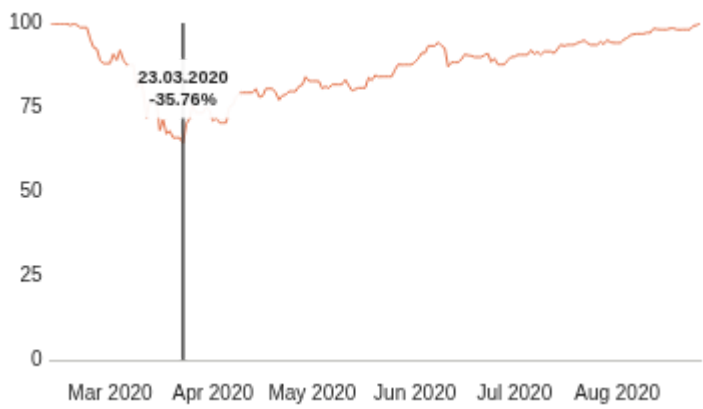
Manager expertise

Dimensional's reputable team of Nobel winners and other financial academic experts is responsible for the quantitative models that serve as the basis of all Dimensional funds.

Differentiated portfolio

The fund runs a quantitative model that overweight in small value companies and underweight in large growth companies. The ESG carbon screening appeals investors with related investment requirements.

Historischer maximaler Drawdown & Erholungszeit



|                              |          |
|------------------------------|----------|
| Max. Drawdown (seit Auflage) | -35.76%  |
| Erholungsperiode             | 156 Tage |

Diversifizierung



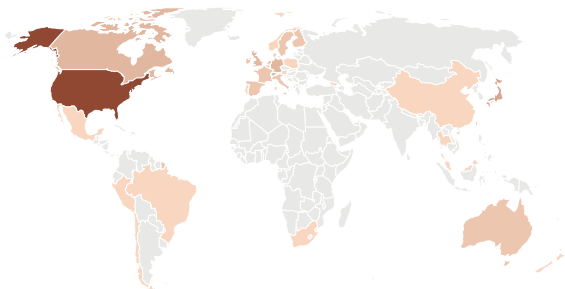
Top 10 Positionen

|                                |       |
|--------------------------------|-------|
| Apple Inc                      | 5.28% |
| NVIDIA Corp                    | 4.42% |
| Amazon.com Inc                 | 2.52% |
| Meta Platforms Inc Class A     | 2.16% |
| Microsoft Corp                 | 1.98% |
| Broadcom Inc                   | 1.18% |
| Alphabet Inc Class A Common Sh | 0.98% |
| Alphabet Inc Class C Common Sh | 0.82% |
| Johnson & Johnson              | 0.78% |
| Walmart Inc                    | 0.77% |



Sektoren

|                        |        |
|------------------------|--------|
| Technology             | 22.33% |
| Financials             | 19.35% |
| Industrials            | 13.04% |
| Consumer Discretionary | 10.63% |
| Health Care            | 10.57% |
| Communications         | 8.38%  |
| Materials              | 5.07%  |
| Consumer Staples       | 4.99%  |
| Real Estate            | 2.65%  |
| Energy                 | 1.56%  |
| Utilities              | 0.95%  |
| Others                 | 0.47%  |



Geographie

|                |        |
|----------------|--------|
| U.S.A.         | 69.06% |
| Japan          | 6.08%  |
| United Kingdom | 3.61%  |
| Canada         | 3.40%  |
| Switzerland    | 2.85%  |
| Germany        | 2.16%  |
| France         | 1.76%  |
| Netherlands    | 1.70%  |
| Australia      | 1.44%  |
| Sweden         | 1.29%  |
| Ireland        | 1.11%  |
| Others         | 5.55%  |

Gefällt Ihnen dieser Fonds? Sprechen Sie mit uns!

Möchten Sie mehr über diese Investitionslösung oder über uns erfahren?

MIT UNSEREM RESEARCH-TEAM SPRECHEN



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