Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
Community Capital Management Intermediate Fixed Income Composite

About This Strategy

Assets Under Management (AUM): $2238.5M (in US$ millions)
Required Minimum: $10 million
Benchmark used: Barclays Capital US Aggregate Bond
Strategy type: Bond (Fixed Income)

Strategy description: Community Capital’s Intermediate Fixed Income Separate Account Strategy (“Intermediate Fixed Income Composite”) is managed against the Barclays U.S. Aggregate Bond Index. The strategy is an actively managed portfolio of fixed income investments that seeks to produce above-average, risk-adjusted returns while offering added diversification and simultaneously having a positive impact on the community and the environment. The Composite primarily invests in government-related subsectors of the bond market traditionally excluded from the major bond indices.

Strategy web link: External Link

About The Company

Institution Name: Community Capital Management

Approach to Sustainable & Responsible Investment: Founded in 1998, Community Capital Management, Inc. invests in government-related subsectors of the bond market traditionally excluded from the major bond indices. The firm's primary goal is to produce above-average, risk-adjusted returns while providing added diversification and simultaneously having a positive impact on the community and the environment. As of 6/30/12, Community Capital Management has invested over $5.6 billion in community development initiatives nationwide on behalf of its clients, generating results that make a powerful community impact.

Total AUM in SRI: $1857.7M (in US$ millions)
Research conducted: Internally
Researcher name: Portfolio management team

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Specific Screening Information by Category
Environment

- **Climate / Clean Technology**: *Positive Investment*
- **Pollution / Toxics**: *No Investment*
- **Other Environmental**: *Positive Investment* - The firm proactively screens bonds that have community development (which may include environmental activities) as its primary purpose.

Social

- **Community Development**: *Positive Investment* - The firm proactively screens bonds that have community development (which may include environmental activities) as its primary purpose.
- **Diversity & Equal Employment Opportunity**: *Positive Investment*
- **Human Rights**: *Positive Investment*
- **Labor Relations**: *No Investment*
- **Conflict Risk**: *No Investment*

Governance

- **Board Issues**: *No Investment*
- **Executive Pay**: *No Investment*

Products

- **Alcohol**: *No Investment*
- **Animal Welfare**: *No Investment*
- **Defense/Weapons**: *No Investment*
- **Gambling**: *No Investment*
- **Tobacco**: *No Investment*

Other

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