Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
Access Capital Community Investing

About This Strategy

Assets Under Management (AUM): $892.6M (in US$ millions)

Required Minimum: $20 million

Benchmark used: Barclays Capital US Aggregate Bond

Strategy type: Bond (Fixed Income)

Strategy description: Impact investing that provides the double-bottom line benefit of aiding underserved communities while seeking to earn a market rate of return through the support of low- and moderate-income homebuyers, affordable rental housing units, small business administration loans and economic development projects. Invests in high quality, highly liquid and market-priced investments. Benchmarked to the Barclays Securitized Index or customized indices

Strategy web link: External Link

About The Company

Institution Name: RBC Global Asset Management

Approach to Sustainable & Responsible Investment: RBC GAM manages $323.3 billion in AUM globally across all major asset classes. The Access Capital Community Investment strategy is a socially responsible fixed income investment that supports homeownership, affordable rental housing, small business lending, healthcare and other economic development activities targeted to low and moderate income individuals or communities. Investments are AAA securities and investors can target their investments by geographic location.

Research conducted: Internally

Researcher name: The Access Capital portfolio managers and analysts perform the primary ESG research for this fund.

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Specific Screening Information by Category

Environment

- Climate / Clean Technology: Positive Investment
- **Other Environmental**: *Positive Investment*

**Social**
- **Community Development**: *Positive Investment* - SRI that helps build stronger communities through its support of low and moderate income homebuyers, affordable rental housing, small business lending and other economic development projects. Investors can target their investments by geographic location.
- **Human Rights**: *No Investment*
- **Labor Relations**: *No Investment*
- **Conflict Risk**: *No Investment*

**Governance**

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

**Other**
- **Other/Qualitative**: *All investments are screened for social benefits (Housing, Healthcare, Education, Services and Jobs).*