Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
First Affirmative SRI Fixed Income

About This Strategy

Assets Under Management (AUM): $46M (in US$ millions)
Required Minimum: $50,000
Benchmark used: Barclays Intermediate Government / Credit Bond Index
Strategy type: Bond (Fixed Income)

Strategy description: The SRI Fixed Income fund typically consists of 10-20 taxable fixed income mutual funds. The investment objectives are to provide a competitive level of current income and to manage risk through diversification among different types of fixed income securities as well as by investing primarily in bond funds with intermediate duration.

Strategy web link: External Link

About The Company

Institution Name:
First Affirmative Financial Network, LLC

Approach to Sustainable & Responsible Investment: First Affirmative serves individuals and institutions who are seeking to both make money and create a positive impact with their investments, at the same time. We have been designing investment portfolios that align client values with their financial goals since 1988, with environmental, social, and corporate governance (ESG) criteria firmly embedded in the investment process. Our Sustainable Investment Solutions process places a heavy emphasis on diversification to mitigate market risks, creating the mix of investment assets with the highest probability of delivering strong returns within reasonable risk parameters. We take advantage of our strong SRI community ties and act as a manager of managers for many of our larger portfolios. Fiduciary duty is at the heart of our investment philosophy. We spread our vision through nationwide network of knowledgeable and experienced investment professionals.

Research conducted: Both internally and externally

Researcher name: First Affirmative Financial Network, LLC

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Specific Screening Information by Category

Environment
Climate / Clean Technology: Combination of Positive and Restricted/Exclusionary Strategies
Pollution / Toxics: Combination of Positive and Restricted/Exclusionary Strategies
Other Environmental: Combination of Positive and Restricted/Exclusionary Strategies

Social

Community Development: Combination of Positive and Restricted/Exclusionary Strategies
Human Rights: Combination of Positive and Restricted/Exclusionary Strategies
Labor Relations: Combination of Positive and Restricted/Exclusionary Strategies
Conflict Risk: Combination of Positive and Restricted/Exclusionary Strategies

Governance

Board Issues: Combination of Positive and Restricted/Exclusionary Strategies
Executive Pay: Combination of Positive and Restricted/Exclusionary Strategies

Products

Alcohol: No Investment
Animal Welfare: Combination of Positive and Restricted/Exclusionary Strategies
Defense/Weapons: No Investment
Gambling: No Investment
Tobacco: No Investment

Other

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