Separate Account Managers in Sustainable and Responsible Investing

Jantz Management 350 All-Cap Value

About This Strategy

Assets Under Management (AUM): $9M (in US$ millions)
Required Minimum: $100,000
Benchmark used: S&P 1500
Strategy type: All Cap

Strategy description: The Jantz 350 All-Cap Value folio seeks high return by investing in a broad capitalization range of socially and environmentally responsible equites determined to be undervalued using Jantz proprietary models. One hundred underpriced stocks, meeting broad social and ESG criteria, are drawn from a universe of S&P 1500 index constituents. The top 200 public fossil fuel companies, identified by Carbon Tracker, are excluded.

Strategy web link: External Link

About The Company

Institution Name:
Jantz Management LLC

Approach to Sustainable & Responsible Investment: Jantz Management uses proprietary quantitative value stock selection models, while incorporating ESG data and broad social concerns. The Jantz 350 and Fossil Free portfolios are designed to meet or exceed the performance of an analogous non-ESG portfolio. We aspire to provide our clients a substantial excess return, while being a socially responsible enterprise, respectful of our clients’ values.

Total AUM in SRI: $32M (in US$ millions)

Research conducted: Externally

Researcher name: Christine Jantz

Contact info:
470 Atlantic Avenue, 4th Floor
Boston, MA 022210
U.S.A.
Phone: 1.617.273.8018
Email: info@jantzmgmt.com
Web: http://jantzmgmt.com

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**

- **Diversity & Equal Employment Opportunity**: Positive Investment
- **Human Rights**: Positive Investment
- **Labor Relations**: Positive Investment
- **Conflict Risk**: No Investment

**Governance**

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

**Products**

- **Alcohol**: Restricted/Exclusionary Investment
- **Defense/Weapons**: No Investment
- **Gambling**: No Investment
- **Tobacco**: No Investment

**Other**

- **Shareholder Engagement - Shareholder Resolutions**: Filed or co-filed with companies on environmental, social or governance issues
- **Shareholder Engagement - Private Dialogue**: Conducted with companies on environmental, social or governance issues
- **Proxy Voting**: Actively voted by my institution for this investment strategy in support of environmental, social or governance issues in accordance with formal guidelines

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1660 L Street NW, Suite 306
Washington, DC 20036
Phone (202) 872 5361 Fax (202) 775 8686