Separate Account Managers in Sustainable and Responsible Investing

Jantz Management 350 Large-Cap 50 Value

About This Strategy

**Assets Under Management (AUM):** $6M (in US$ millions)

**Required Minimum:** $100,000

**Benchmark used:** S&P 500 Composite Total Return

**Strategy type:** Equity Large Cap

**Strategy description:** The Jantz 350 Large-Cap 50 Value folio seeks high return by investing in large capitalization, socially and environmentally responsible equities determined to be undervalued using Jantz proprietary models. Fifty underpriced stocks meeting broad social and ESG criteria are drawn from a universe of S&P 500 index constituents. The top 200 public fossil fuel companies, identified by Carbon Tracker, are excluded.

**Strategy web link:** [External Link](https://charts.ussif.org/sam/strategy_profile_display.php?StrategyID=279&)

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

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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

- 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