Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:
Trillium Fossil Fuel Free Core

About This Strategy

Assets Under Management (AUM): $211M (in US$ millions)
Required Minimum: $2 million direct, $100,000 advisor
Benchmark used: S&P 1500
Strategy type: All Cap

Strategy description: This strategy invests across the range of market capitalizations and economic sectors in companies that meet Trillium’s sustainability criteria. This strategy has no direct exposure to fossil fuels.

Strategy web link: External Link

About The Company

Institution Name:
Trillium Asset Management

Approach to Sustainable & Responsible Investment: Trillium Asset Management is the oldest independent investment advisor devoted exclusively to sustainable and responsible investing (SRI). We believe that environmental, social, and governance (ESG) factors play an integral role in the investment process, which can lower portfolio risk and help identify the best-managed companies. Trillium is a leader in shareholder advocacy and public policy work. Our goal is to deliver both impact and performance to our private and institutional investors.

Research conducted: Both internally and externally

Researcher name: Fundamental Analysts

Contact info:
60 South Street / Two Financial Center
Boston, MA 02111
USA
Phone: 617-532-6680
Fax: 617-482-6179
Email: rice@trilliuminvest.com
Web: http://www.trilliuminvest.com

Specific Screening Information by Category

Environment

- **Climate / Clean Technology**: Restricted/Exclusionary Investment - This strategy has no direct exposure to fossil fuels.
- **Pollution / Toxics**: Restricted/Exclusionary Investment
- **Other Environmental**: Restricted/Exclusionary Investment
Social

- **Community Development**: Combination of Positive and Restricted/Exclusionary Strategies
- **Diversity & Equal Employment Opportunity**: 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 Screens
- **Animal Welfare**: Combination of Positive and Restricted/Exclusionary Strategies
- **Defense/Weapons**: Restricted/Exclusionary Investment
- **Gambling**: Restricted/Exclusionary Investment
- **Tobacco**: Restricted/Exclusionary Investment

Other

- **Other/Qualitative**: The strategy seeks stocks with superior earnings growth prospects and environmental, social, and governance (ESG) records, but which are available at a reasonable price. A team of fundamental, sector focused analysts conduct bottom-up financial analysis including a rigorous integrated review of financial and ESG factors.
- **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

© 2020 US SIF
1660 L Street NW, Suite 306
Washington, DC 20036
Phone (202) 872 5361 Fax (202) 775 8686