Separate Account Managers in Sustainable and Responsible Investing

Sage Tax-Sensitive Fixed Income ESG

About This Strategy

Assets Under Management (AUM): $0M (in US$ millions)

Required Minimum: 250k

Benchmark used: Bloomberg Barclays Municipal Index

Strategy type: Bond (Fixed Income)

Strategy description: The Sage Tax-Exempt Fixed Income ESG Strategy is an actively managed tax-sensitive fixed income mandate that incorporates a top-down investment approach. The strategy will primarily invest in investment grade municipal bonds that display strong fundamentals and positive ESG characteristics evaluated using a proprietary multi-factor ESG framework that is both qualitative and quantitative. In addition, the mandate will be implemented with highly liquid cash bonds allowing it to be delivered in a scalable SMA format.

Strategy web link: External Link

About The Company

Institution Name: Sage Advisory

Total AUM in SRI: $1M (in US$ millions)

Research conducted: Both internally and externally

Researcher name: Sustainalytics and Sage Advisory

Contact info:
5900 SW Parkway, Bldg 1
Austin, TX 78735
United States
Phone: 512-327-5530
Email: nerickson@sageadvisory.com
Web: 5900 SW Parkway, Bldg 1

Specific Screening Information by Category

Environment

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

Social
Community Development: Positive Investment
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: 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
Animal Welfare: No Investment
Defense/Weapons: Restricted/Exclusionary Investment
Gambling: Restricted/Exclusionary Investment
Tobacco: No Investment

Other

Other/Qualitative: At Sage, we see sustainable factor sensitive investing as a way for clients to achieve greater potential returns while doing good from a global and societal perspective. Moreover, we believe that the most compelling investment solutions will be those that combine institutional quality ESG research with comprehensive fundamental and quantitative research, portfolio construction and asset management capabilities. Indeed, we believe that ESG analysis should not be regarded as a substitute for traditional investment analysis but rather a powerful enhancement to it.

Shareholder Engagement - Private Dialogue: Conducted with companies on environmental, social or governance issues

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