Separate Account Managers in Sustainable and Responsible Investing

Sage Taxable Fixed Income ESG

About This Strategy

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

Required Minimum: 250k

Benchmark used: Barclay's Intermediate Corporate Index

Strategy type: Bond (Fixed Income)

Strategy description: The Sage Taxable Fixed Income ESG strategy is an actively managed taxable fixed income mandate that incorporates a top-down investment approach. The strategy primarily invest in investment grade corporate bonds that display strong fundamentals and positive ESG characteristics evaluated using a proprietary multi-factor ESG framework. 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

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

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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