Separate Account Managers in Sustainable and Responsible Investing

Sage Global Equity ESG Strategy

About This Strategy

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

Required Minimum: 250k

Benchmark used: 60% S&P 500 / 40% MSCI ACWI Ex US

Strategy type: International/Global

Strategy description: Actively managed global equity mandate that will invest across domestic and international equity market segments through ETFs that qualify based on Sage’s due diligence process which incorporates both investment and ESG specific factors.

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: 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

- 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**: 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**: Combination of Positive and Restricted/Exclusionary Strategies
• **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