



Expressing institutional values in investment portfolios

PRESENTED BY

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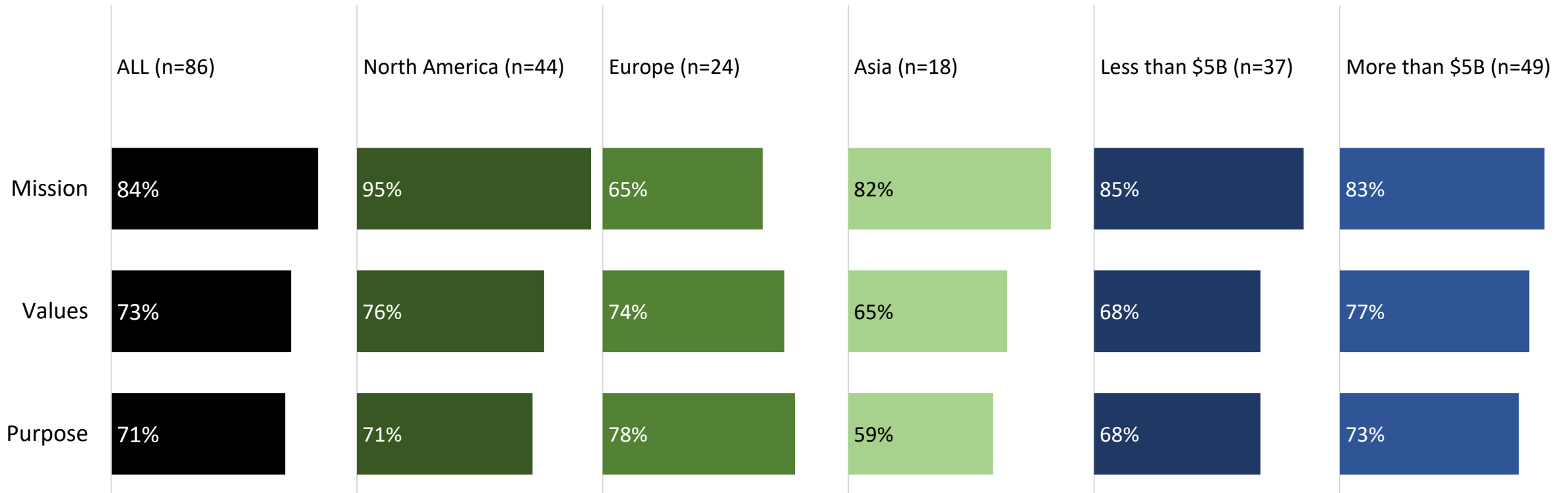
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**Institutional
Investor**

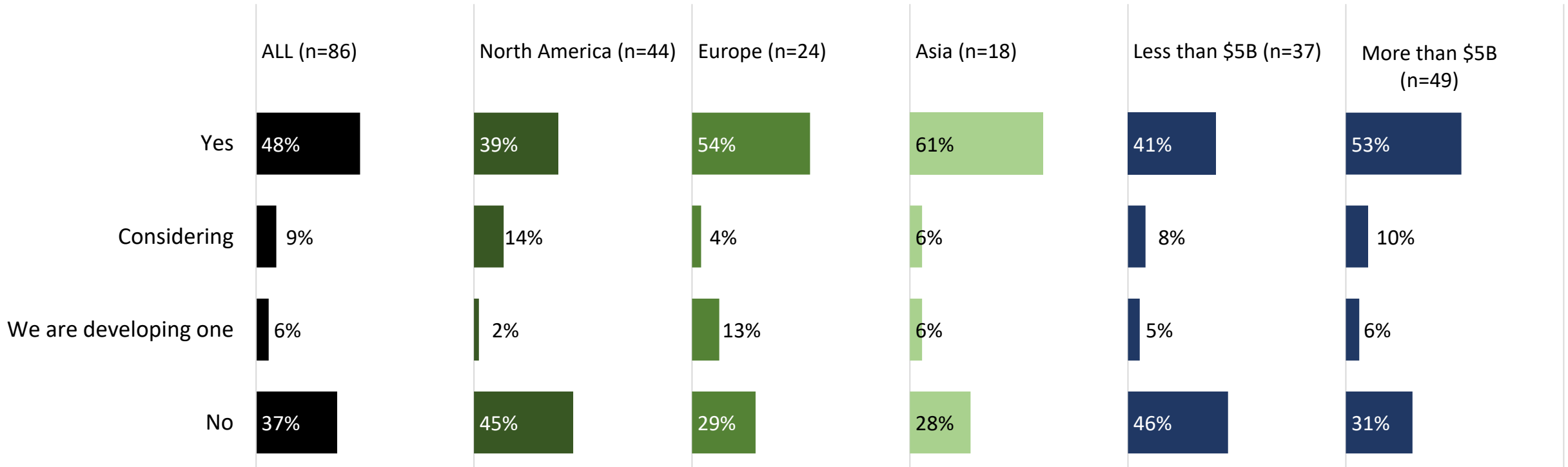
Statements of mission, purpose, and values are commonplace

Does your institution have a statement that articulates your...



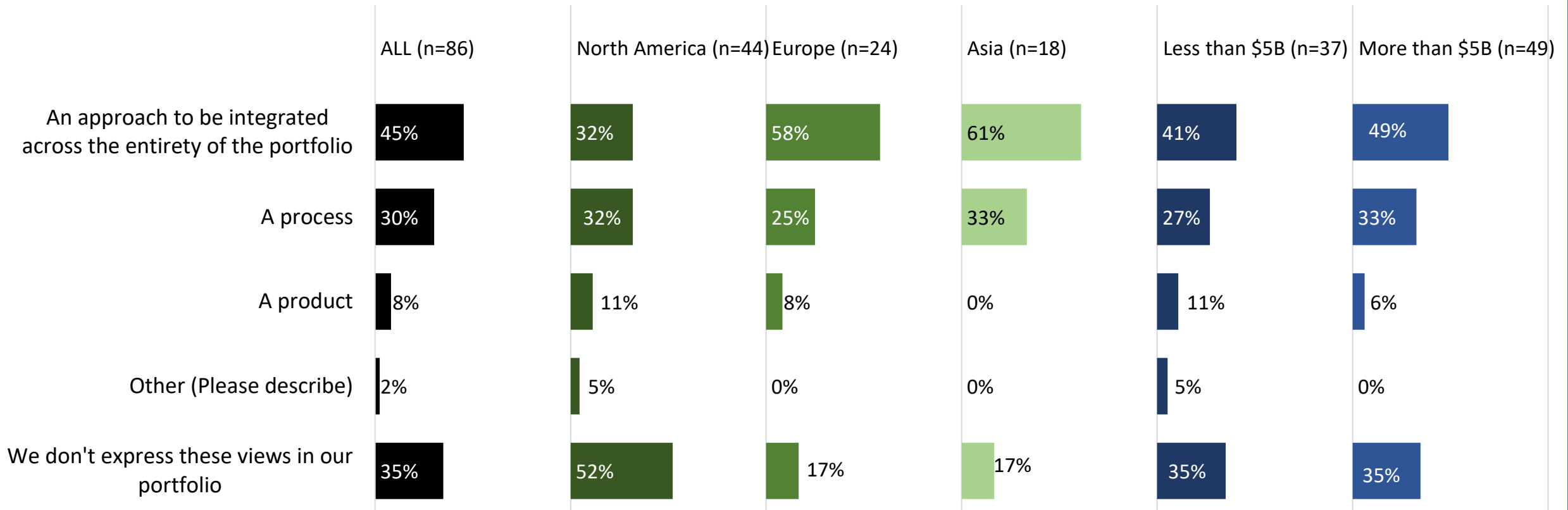
Such statements are less likely to be integrated within investment policies

Do you have a policy that addresses how your investments will support your values?



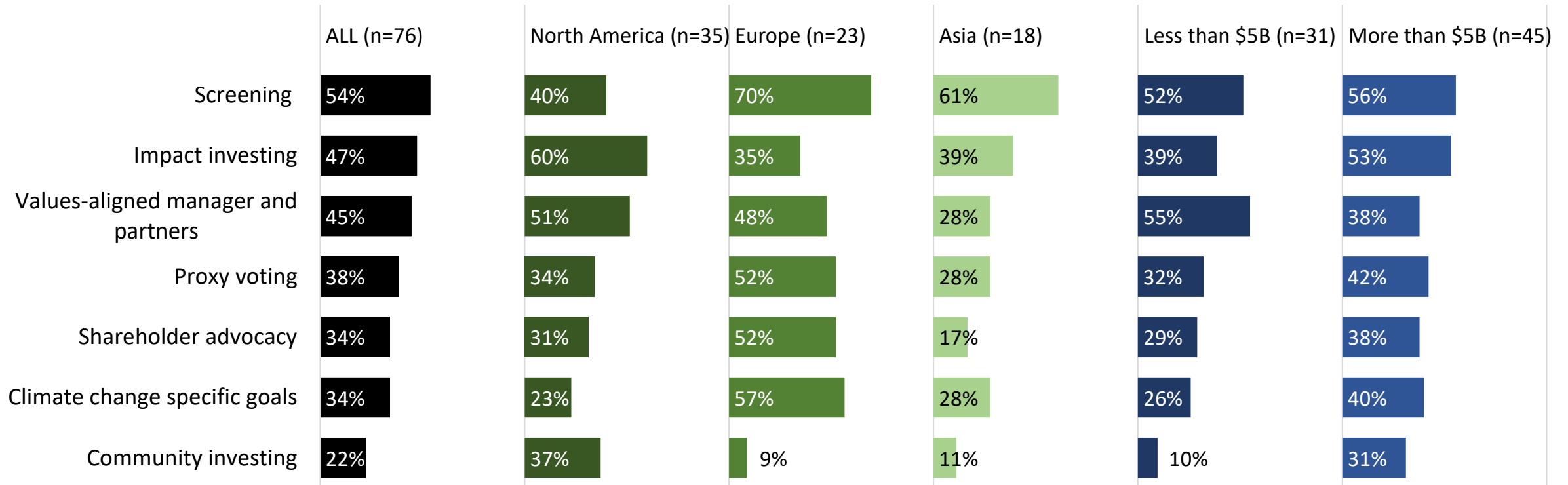
Investors integrate values-based investing across their portfolios

Your firm views values-based investing as...



Values investing through asset screening and impact-focused strategies – often with values-oriented partners

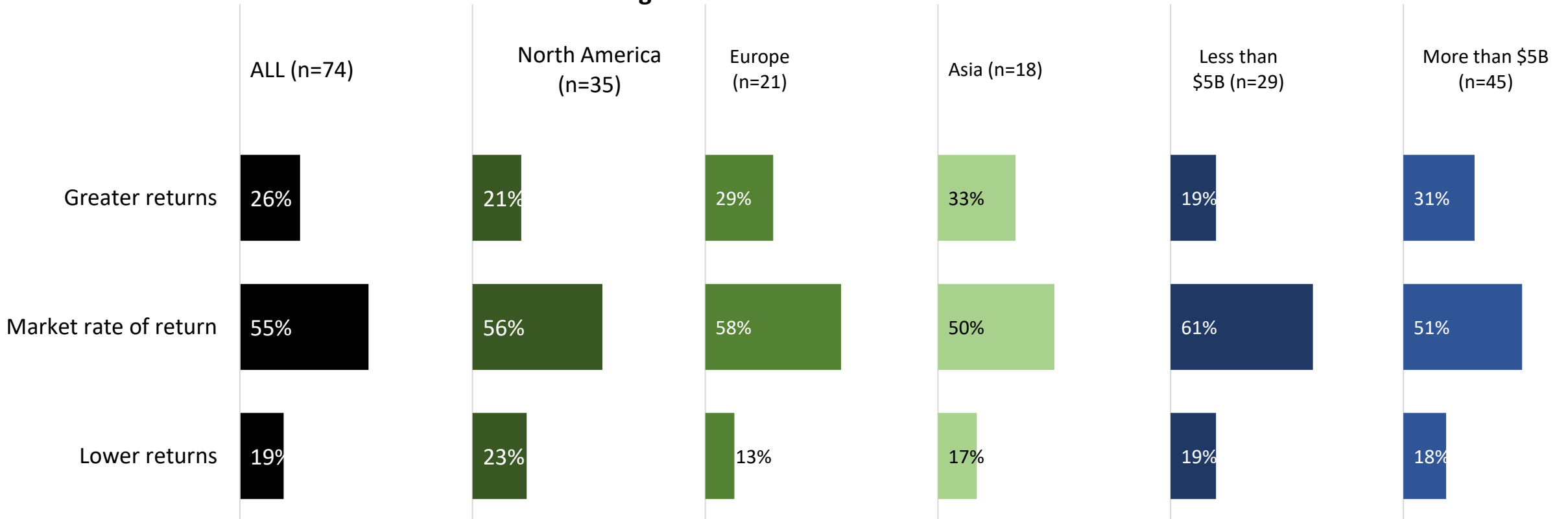
Are you implementing or considering to implement your values-based investing program via...





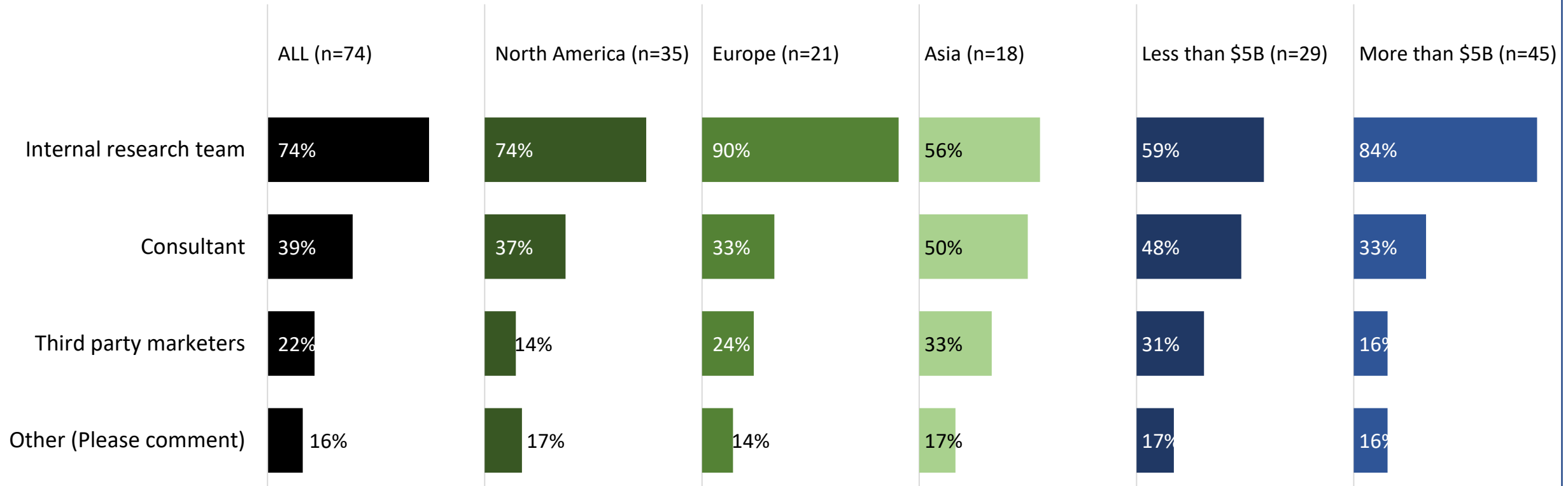
More than three in four respondents expect market returns or higher

Your fund believes values-based investing will result in...



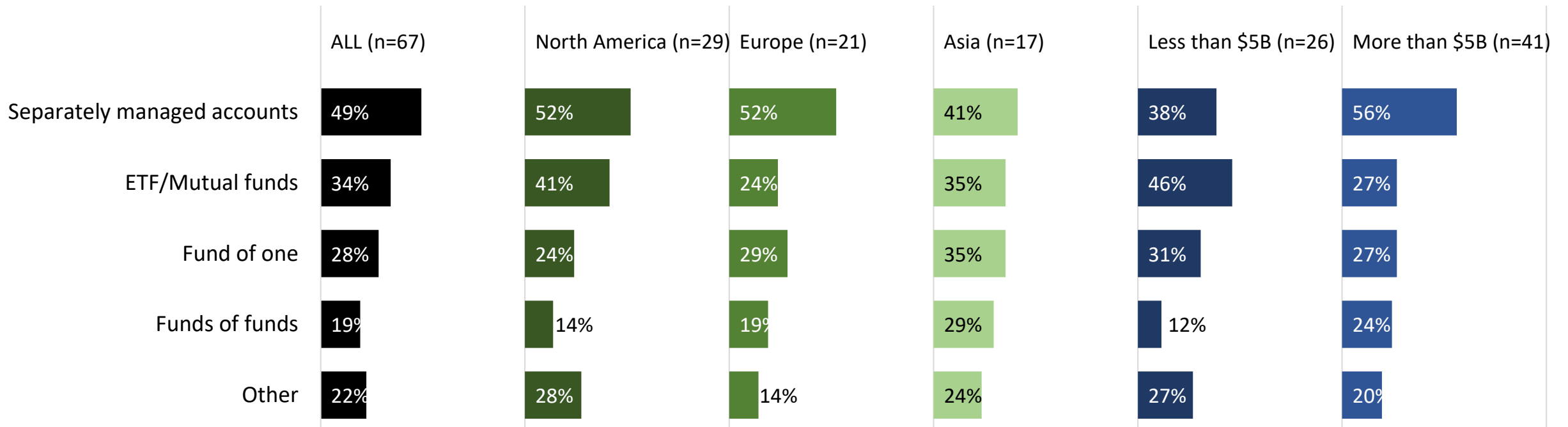
Internal teams provide values-based investment hypotheses

How do you source values-based investment ideas?



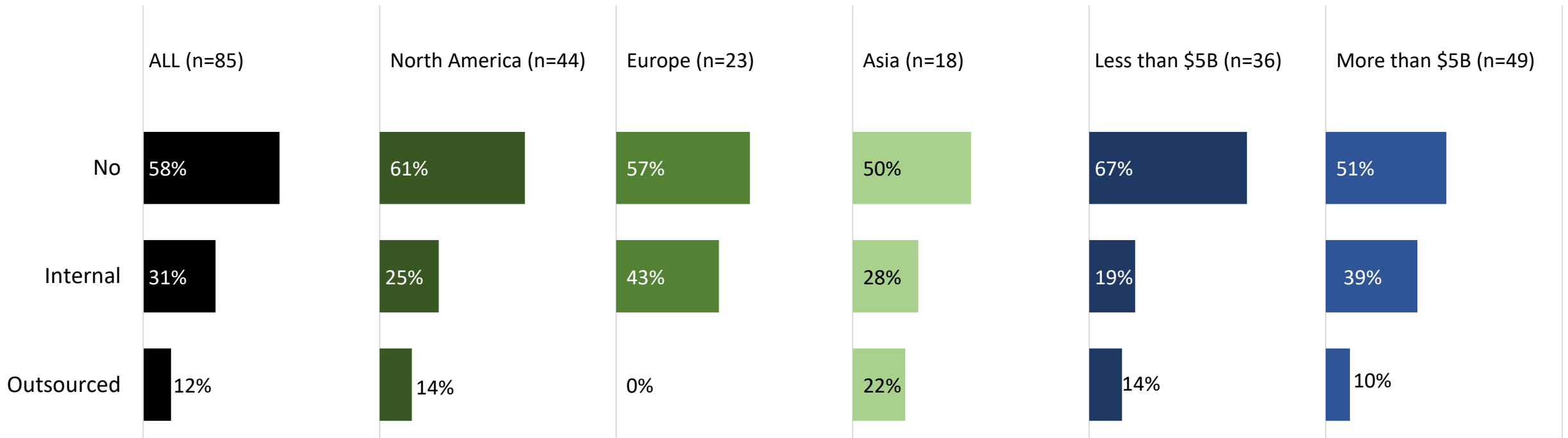
Managed accounts and mutual funds are most common investment vehicles

How do you implement values-based investments?



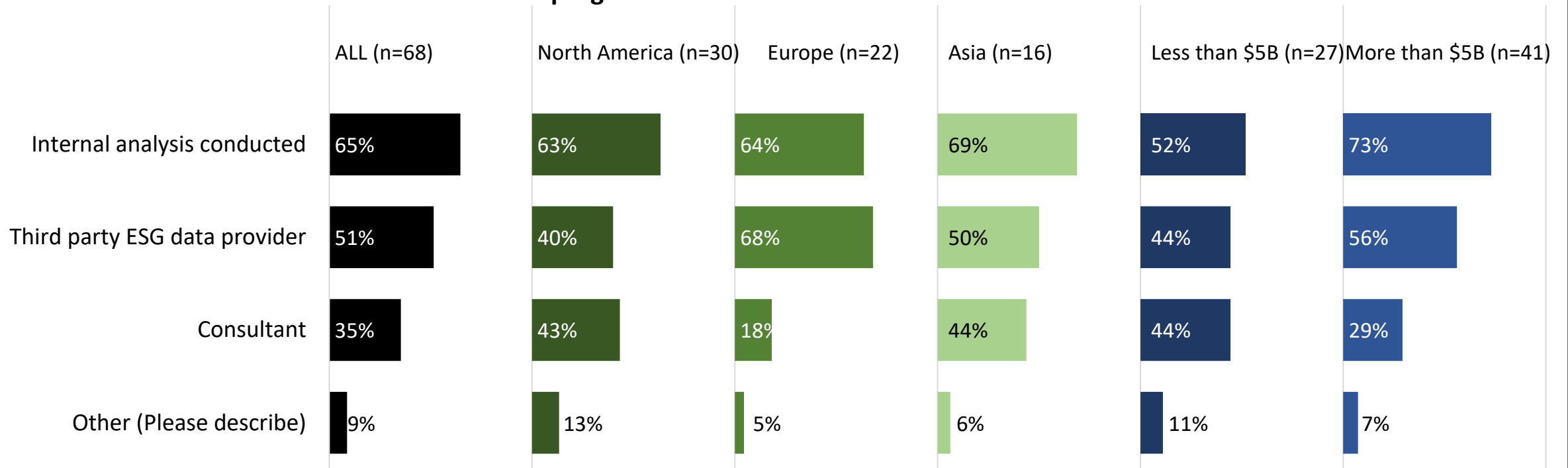
Majority of respondents don't have dedicated resources for values investment strategies

Do you have dedicated resources for values-based investing?



Investors draw on internal and external sources of analysis and data

What resources do you use to assist with the implementation and monitoring of your values-based investing program?



THANK YOU!

Allocator Intel collects exclusive data and insights from the world's most sophisticated institutional allocators. These are used to create research reports and indices to inform market participants of their peers' long-term investment intentions.

This survey was carried out in August and September 2022. More than 85 asset allocators around the world responded to the survey. If you have any questions, please contact your usual Investor Relations contact or Kstrofer@institutionalinvestor.com



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