

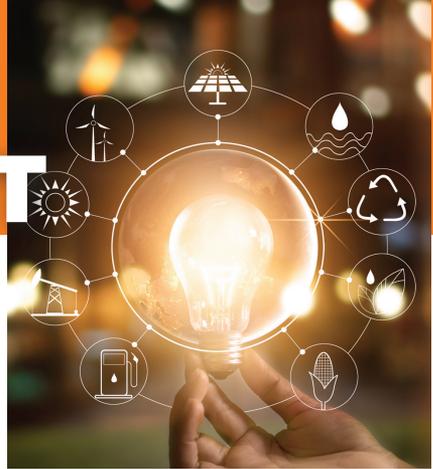
MAKE *an* IMPACT

As of October 31st, 2018, responsible investing strategies totaled \$12 trillion, which equates to 25% of all dollars under professional management.¹ This represents a 38% increase over 2016.¹

Why the rapid growth in ethical investments? Is there a sudden invasion of wealthy do-gooders? Not exactly. Over \$8 trillion of the total comes from institutional investors. While conventional investment theory suggests that socially responsible investing creates an unnecessary drag on performance, the most sophisticated investors, institutions, are pouring assets into these strategies. Why?

In a Nutshell

Investors understand the benefit of diversification to reduce risk in their portfolio by limiting exposure to any single company. Incorporating additional criteria that preferentially selects good corporate citizens and avoids companies with ethical red flags can be an effective way to further reduce risk and potentially



increase returns without affecting broad asset allocation. It's a simple, yet powerful concept that is now supported by academic studies and reports issued by companies like Barclays Research, Bank of America, and Morgan Stanley.

Invest with Character

Socially responsible investing began as a way for conscientious investors to integrate their morals into their portfolio and generate positive social impact. Today, its benefits enable the wider investing public to live their values by asking questions like: What am I *really* invested in? What impact am I having? Can I do a little better?

1. US SIF. "Report on US Sustainable, Responsible and Impact Investing Trends" Oct. 2018

Invest with CHARACTER.

Double Bottom Line Investing:

Investment Returns

- Fees

= Traditional Net Returns

+ Social & Ethical Returns

= **Real World Impact**



*Invest ethically.
Invest logically.
Invest with Ethos Logos.*

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