



Institutional Investment Management Insights

Vol. 2

A Growing Investment Option: Environmental, Social and Corporate Governance Investing

The investment landscape is evolving, and interest in sustainable investing is on the rise. Investors are currently more involved, interested and active in corporate responsibility than ever before leaving many investors searching for sustainable investing options. When making investment decisions, institutions and investors are considering the social and ethical values of corporations, whether those values center on social responsibility, green efforts, diversity or other topics. Today, more and more institutions and investors are aligning their values with their portfolios by focusing on environmental, social and corporate governance (ESG) investing.

Although this method of investing is on the rise – *Forbes* estimates the global market for responsible investing at \$23 trillion and growing – the concept of ESG investing is not new to UMB Bank. The Institutional Investment Management

Institutions often have a fiduciary responsibility to align investments with the values and mission of that organization. The UMB IIM team has the tools and resources to evaluate a client investment policy statement and determine what areas of investing would be acceptable for that client.

While each client's portfolio can be tailored to have the most positive impact based on their values, the UMB IIM team also offers an ESG portfolio that can align with the needs of most investors. By leveraging the current process UMB has in place for portfolio managers and adding an additional layer of ESG screens, clients can receive social responsible investing options without sacrificing performance. This ESG portfolio launched in March 2018 and already has more than \$5 million invested in this specific portfolio with

(IIM) team has been providing these services to faith-based clients for more than 20 years. The team has seen ESG investing evolve and an increasing number of clients are requesting portfolio screens that match up with specific values.

additional millions invested in other socially screened portfolios.

UMB's ESG investment portfolios focus on three areas:

- Environmental: weather, water, air and waste management
- Social: data security, human rights and community development
- Governance: company management, fraud and diversity

Making a positive impact

ESG investing isn't just about excluding investments that institutions or investors don't agree with; it is about individuals making investment decisions based on what is beneficial for the economy and society. ESG investments also include funds based on the positive impact the company's environmental, social or governance issues can have on its financial performance. These factors are ranked on a positive scale, and each ESG opportunity can vary widely in the spectrum of characteristics, allowing investors flexibility and customization. ESG investing allows institutions or investors to customize their approach by excluding and/or including funds based on a values scale.

At UMB IIM, we offer solutions tailored for clients who are interested in responsible investing ESG portfolios, in addition to our comprehensive suite of investment services. Our team is dedicated to finding a way to align social and ethical values with your investment practices. To learn more about ESG investing, or any of the other services the team offers, visit our [blog](#), or contact one of our portfolio managers.



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