

# Sustainable investing

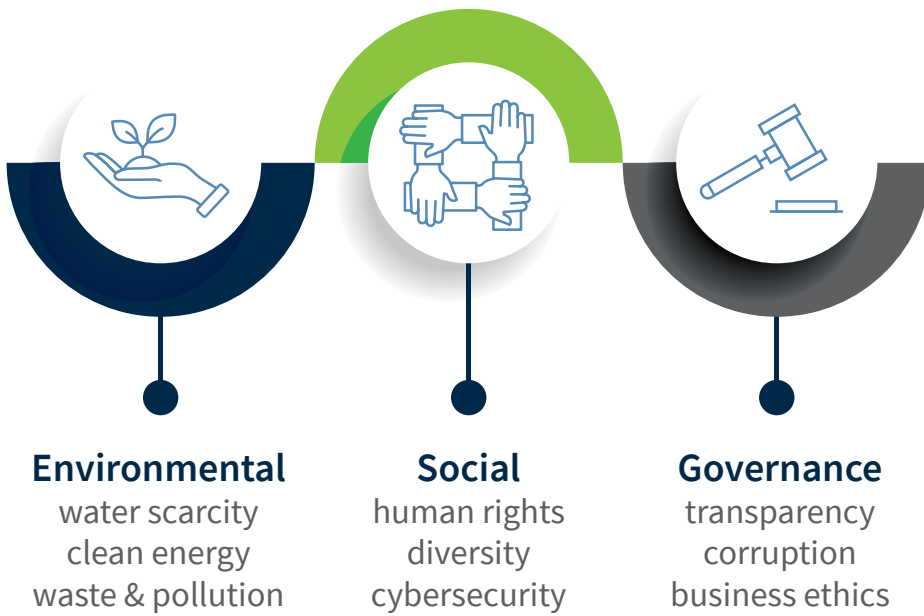
## Misconceptions vs. reality

There are several ways to invest sustainably, and the terms used to describe them vary. To clarify this growing area of investment, we dispel four common misconceptions.

### MISCONCEPTION #1

#### It's mostly about the environment.

**Reality:** Sustainable investing covers a wide range of environmental, social and governance (ESG) issues, which include:



#### Top motivations:

Mitigating risks | Making a positive impact  
Aligning investments with values | Prioritizing long-term performance

### MISCONCEPTION #2

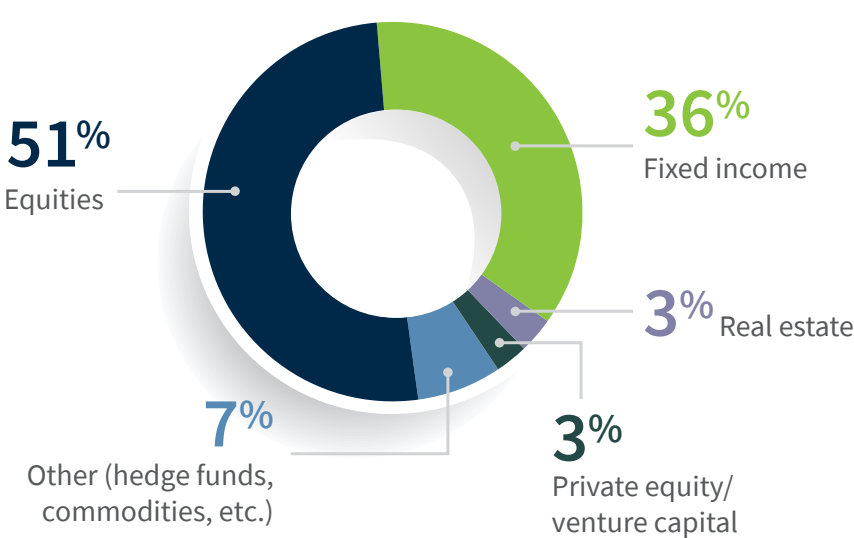
#### Sustainable investing is too niche.

**Reality:** Sustainable investing, by broad definition, is **up 38%** since 2016 – to the tune of \$12T.

**350+ funds** are marked sustainable by Morningstar. Tax credit funds and sustainable bonds surpassed **\$250B** in 2018.

#### SUSTAINABLE INVESTING ACROSS ASSET CLASSES

(2018 data from Europe, the United States, Japan and Canada)



### MISCONCEPTION #3

#### Sustainable investing means sacrificing performance.

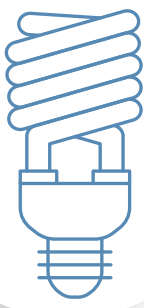
**Reality:** ESG strategies may equal or outperform conventional counterparts.



An analysis of 2,200 studies showed ESG rankings had a **positive or neutral impact** on stock performance **90% of the time**.

### MISCONCEPTION #4

#### Only women and millennials care about sustainable investing.



**Reality:** More than a quarter of global assets have some basis in sustainable strategies, driven by institutional and individual investors, across all ages, genders and net worths.

**72% of U.S. investors** surveyed in 2019 expressed at least a moderate interest in sustainable investing, with no statistically significant preferences by gender or age.



#### Seeking more clarity on sustainability?

Reach out to us to learn more about the variety of investing options available to you.

Sources: US SIF's 2018 Global Sustainable Investment Review; Forum for Sustainable and Responsible Investment; The Investment Integration Project; Money Management Institute; Journal of Sustainable Finance & Investment; Global Sustainable Investment Alliance; Morningstar, "The True Faces of Sustainable Investing," 2019

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