

Chesapeake Bay Commission

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About US | SIF

Mission Statement:

- Rapidly shift investment practices towards sustainability, focusing on long-term investment and the generation of positive social and environmental impacts.

Vision Statement:

- Environmental, social and governance (ESG) impacts are meaningfully assessed in all investment decisions resulting in a more sustainable and equitable society.

About US | SIF: Who are our Members?

- Asset Management Firms
- Asset Owners
- Service Providers
- Community Investment Institutions
- Non Profit Organizations

About US | SIF: Stakeholder Engagement

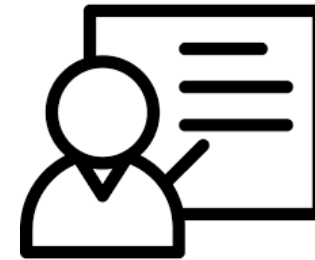
US | SIF Engages Its Stakeholders Through:



Research



Networking



Education



Public Policy



Outreach

What is Sustainable, Responsible and Impact (SRI) Investing?

Sustainable, responsible and impact investing (SRI):

- an investment discipline that considers
- environmental, social and corporate governance (ESG) criteria to
- generate long-term competitive financial returns **and** positive societal impact.

Sustainable Investment Market Size

SIZE OF SUSTAINABLE, RESPONSIBLE AND IMPACT (SRI) INVESTING 2016



SOURCE: US SIF FOUNDATION AND CERULLI ASSOCIATES

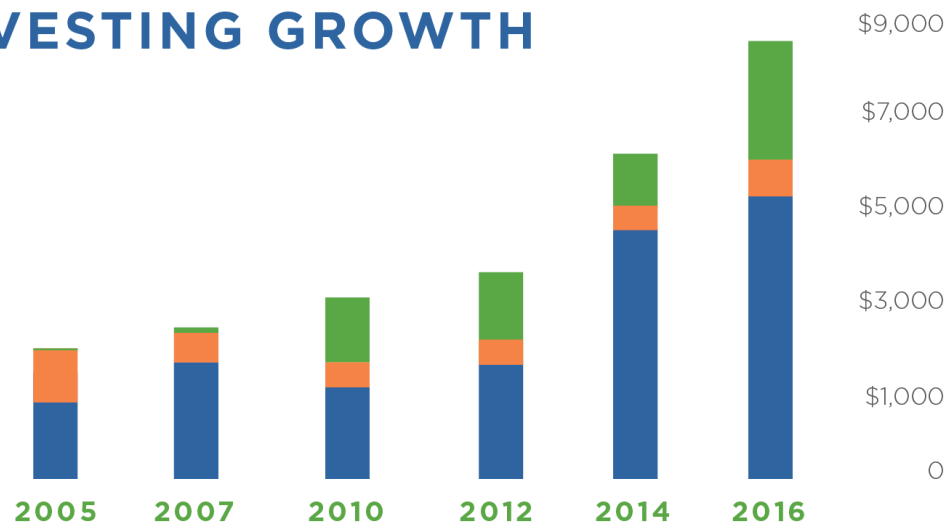
Sustainable Investment Market Growth

SUSTAINABLE INVESTING GROWTH IN THE UNITED STATES (BILLIONS) 2005-2016

SUSTAINABLE INVESTING GROWTH
SINCE 2014

33%

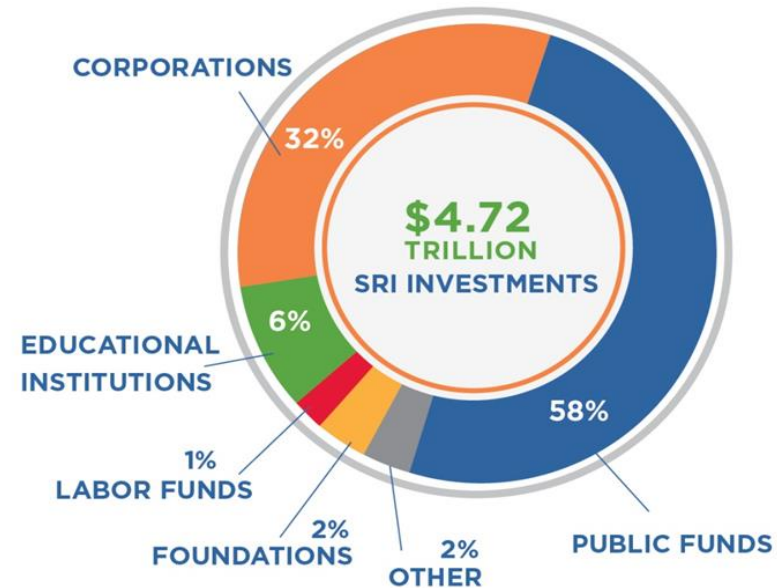
OVERLAPPING STRATEGIES ■
SHAREHOLDER RESOLUTIONS ■
ESG INCORPORATION ■



SOURCE: US SIF FOUNDATION

ESG Incorporation by Institutional Asset Owners

INSTITUTIONAL INVESTORS: SHARE OF ESG ASSETS 2016



SOURCE: US SIF FOUNDATION

Examples of ESG Criteria



Debunking the Sustainable Investing Myth

FACT: A growing body of evidence indicates that **ESG** investments achieve comparable or even better financial returns than conventional investments.

SRI Investing Opportunities in the Chesapeake Bay Region

SRI Study Bill to Evaluate:

- Current practices in PA, MD and VA regarding SRI investing of public funds
- Current state laws pertaining to SRI investing
- Identify opportunities to incorporate SRI investing in state laws

SRI Investing Opportunities in the Chesapeake Bay Region

- **SRI Investing Legislation:**

- Add language to state code that enables or requires ESG consideration for state funds (ex: pension funds)
- Create a sustainable investment option for state employees retirement savings plan

SRI Investing Opportunities in the Chesapeake Bay Region

Request State Treasurer:

- Vote proxies that are in alignment with state priorities
- Submit shareholder proposals that are in alignment with state priorities
- Request portfolio review that ensures investments are aligned with state priorities

We Invite You to the US | SIF Annual Conference

Investing For a Sustainable World

May 31 – June 1, Washington D.C.



Contact and Connect With Us

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