

ESG Policy Statement

Spring 2019



Our Goal

At Chicago Equity Partners, our ultimate goal is to provide comprehensive investment solutions for our clients, fulfilling their financial objectives in a manner consistent with their organizational missions and values. Adding environmental, social, and governance (ESG) considerations to our robust quantitative investment strategies enables us to better achieve that objective.

Process and Commitment

We have a proud history of investment research, portfolio construction, security selection, and risk management expertise that has helped clients achieve their financial objectives. In addition to our quantitative analysis of companies' fundamental characteristics and financial results, our industry analysts consider ESG factors we believe have a material impact on the long-term financial performance and valuation of companies.

Expanding on our decades of experience with socially responsible investing, including ESG data as factors in our investment analysis, helps us build portfolios that more closely align with clients' organizational missions and values while helping to shape a better society.

Leadership Council

At Chicago Equity Partners, research and decision-making are a team effort, and this extends to the ESG analysis and the integration of ESG factors into the investment process. Representatives from across the firm participate on the ESG Leadership Council to facilitate communication and advancement of our responsible investing efforts.

UNPRI

It is the goal of Chicago Equity Partners to enhance our ESG practices and expand our capabilities and commitment in the area of responsible investing in accordance with the United Nations Principles for Responsible Investment (UNPRI).

Active Ownership

Chicago Equity Partners' Proxy Committee works closely with our proxy voting agent, Glass Lewis, a signatory to the UNPRI, on all voting decisions. Glass Lewis incorporates ESG information and Sustainability Accounting Standards Board (SASB) Materiality as part of its voting recommendations.