



Trillium offers strategies that advance humankind towards a global sustainable economy, a just society, and a better world.



Innovators in ESG:

- Exclusively focused on ESG investing since 1982
- Continuously on the forefront of ESG thought leadership
- Uses a holistic, fully integrated fundamental investment process to uncover compelling long-term investment opportunities



Dedicated to Impact:

- Trillium believes 'impact is active'
- Leverages full breadth of company resources to engage with companies and governments, activating stakeholders' assets to create concrete, positive social and environmental change on a global scale
- Current priorities include economic inequality, diversity & inclusion, climate change and pollution



Commitment to Community:

- Devoted to aligning clients' values and objectives by combining impactful investment solutions with active ownership to provide 'social dividends'
- Certified B Corporation member since 2008 and 'Best for World Overall' Honoree for 7 consecutive years*

Utilizing multiple approaches to yield maximum 'social dividends'

We believe that a company's commitment to implementing policies and practices demonstrating ESG leadership create a distinct competitive advantage and builds long-term value. Active managers who are best able to identify such leadership are positioned to create durable portfolios exposed to emerging growth trends. We believe this is backed up by four key observations:

1. Academic evidence that ESG performance matters

Numerous academic studies have shown that better ESG performance can lead to better risk-adjusted financial performance and/or returns. The research helps provide credibility to ESG focused investment approaches as well as clarifies which issues may be most important to driving future returns.

2. Shareholder advocacy creates value for clients

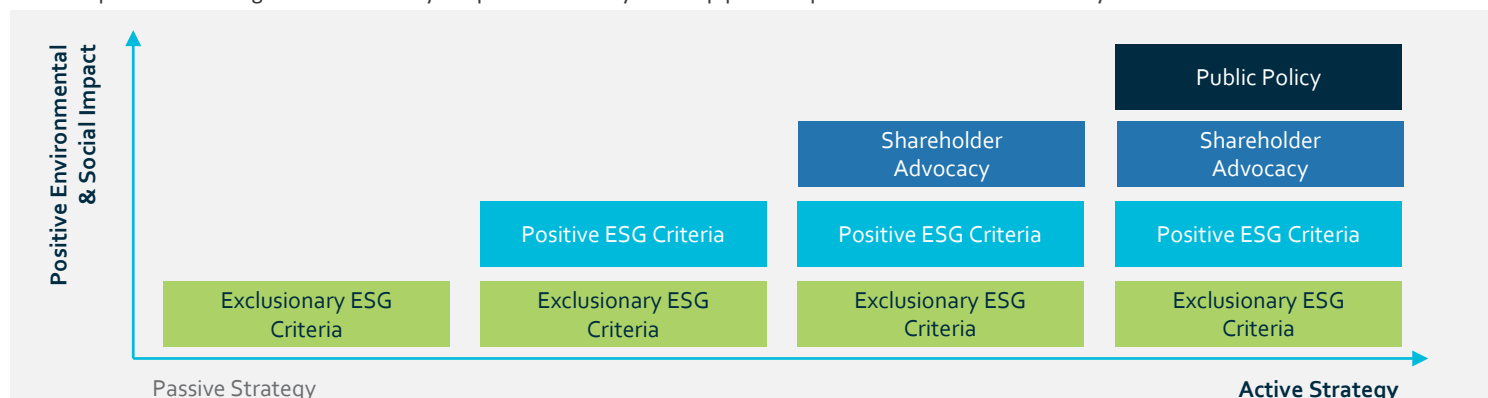
Managers with a focus on advocacy have helped companies address key ESG risks before they become news headlines. Some companies have even endorsed shareholder proposals because they recognize the recommendations can help them compete.

3. Companies integrating ESG leadership with their brand

The best companies are pursuing best practices because they believe their customers, employees, and suppliers want to see it embedded in their brand and business model. This helps create loyalty, helping to secure pricing power with customers and better recruitment and retention of employees.

4. Expanding ESG markets creates demand for experienced/specialist ESG managers

ESG focused products are proliferating and attracting flows – this increased interest has created support for companies deemed to be leaders as products. Managers with an ability to spot trends early can help position portfolios ahead of the money shift.



Trillium's integrated ESG investment approach integrates in-depth ESG research and analysis with rigorous, fundamental financial diligence to help identify companies best-positioned to deliver risk-adjusted, long-term outperformance.

Trillium's Sustainable Investment Approach



About Trillium Asset Management

Trillium Asset Management, with over \$5.7 billion in assets under advisement (\$4.8 AUM and \$900M in model assets as of 6/30/2021), offers investment strategies and services that advance humankind towards a global sustainable economy, a just society, and a better world. For nearly 40 years, the firm has been at the forefront of ESG thought leadership and draws from decades of experience focused exclusively on responsible investing. Trillium uses a holistic, fully integrated fundamental investment process to uncover compelling long-term investment opportunities. Devoted to aligning stakeholders' values and objectives, Trillium combines impactful investment solutions with active ownership. The firm delivers equity, fixed income, and alternative investments to institutions, intermediaries, high net worth individuals, and other charitable and non-profit organizations with the goal to provide positive impact, long-term value, and 'social dividends'.

Contact Information

ContactUs@trilliuminvest.com

800-548-5684

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Please note this email is for general inquiry purposed and personal information should not be provided.

*The B Corporation award is not indicative of the future performance of Trillium Asset Management. Past performance is not a guarantee of future results. B Lab, a non-profit organization helping companies manage corporate social responsibility, recognizes businesses that have earned an overall score in the top 10% of approximately 2,500 Certified B Corporations on the B Impact Assessment. The assessment analyzes a company's contributions to community development, employees, governance, and the environment.

