

Socially Responsible Investing

At Reynders, McVeigh, we believe that socially progressive investors have opportunities “away from the herd” that can yield superior longer term returns.

We provide investment guidance to a wide range of clients including individuals, families, family offices, endowments, foundations, retirement plans, and trust departments. Our success is rooted in the belief that the traditional socially responsible paradigm of screening out so-called “sin stocks” is not effective on its own. Instead, we “screen in” equities demonstrating strong balance sheets, stable management, and an awareness of their role in the global community.

Our socially responsible investment philosophy has helped our portfolios achieve solid financial and social cumulative returns since 2006. Today, we are trusted with over \$1 billion in assets under management and an additional \$4 billion in assets under advisement.

Our Approach

We combine meticulous research and a multi-year strategy to uncover companies that other investors may overlook. As part of our rigorous process we:

- Evaluate balance sheets
- Scrutinize income statements
- Review multiple valuation metrics
- Understand catalysts for growth and potential revaluations

Risk Management

Liabilities can take root beyond the balance sheet. We gain better insight into how each prospective investment will fare across a range of economic scenarios through the proper integration of environmental, social, and governance (ESG) analysis, which we believe is a critical complement to our proven quantitative analysis. We aggregate 100 million pieces of data from more than 400 sources for our proprietary method of identifying externalities that can impact financial performance, and we consider our approach to be the highest fiduciary standard.





Current Industry Focus

Our vision lies on the horizon - for investments we believe will, in the near future, bear considerable fruit for our clients and the world around us. To that end, we seek out low-debt companies with progressive management teams, operating in industries that enjoy consistent or growing demand.



ENVIRONMENTAL TECHNOLOGIES:

RECYCLING; CLEANER PROCESSES; POLLUTION SOLUTIONS



HEALTH:

LOW-COST DRUGS & TREATMENT; NEW MEDICAL FRONTIERS; HIGHER EFFICACY; WELLNESS & NATURAL FOOD SYSTEMS



CLIMATE CHANGE:

ENERGY SOLUTIONS; ECOLOGY CHANGE/WATER/FOOD ACCESS; CARBON EFFICIENCY & MITIGATION



INFORMATION MOBILITY:

GLOBAL INFORMATION ACCESS; MOBILITY; NEW TECHNOLOGY FRONTIER

PASSIONATELY INDEPENDENT

We are beholden solely to our clients, not outside product providers. This allows us to make truly objective investment selections.

FOREFRONT OF SRI

- Our goal: To outperform major global indices over full market cycles.
- Long-term investment horizon directing capital toward progressive industry leaders and driving social improvement and innovation.

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