

## Public Equity Impact Management Resource List

### Example of Open Source Public Equity Lists

- ▶ T100 Directory – investor flow
- ▶ Sustainable ETFs and Mutual Funds like TIAA CREF, Dimensional, Vanguard, Calvert, GreenAlpha
- ▶ Global Knight - Listing of Sustainable Companies
- ▶ B Corp - growing list of public companies that are B Corps
- ▶ Social Stock Exchange - 12 listed and growing

### Examples of ESG Ratings/Scorecards/Data Providers

- ▶ HIP Investor - scorecard
- ▶ MSCI - ESG Ratings and Scores
- ▶ Bloomberg - Raw data, no ratings
- ▶ CSRhub - Ratings of 16,891 companies
- ▶ Sustainalytics - responsible investing
- ▶ Opportunity Index - measures 16 key indicators of opportunity (economic, educational, etc.) in all 50 states in the US
- ▶ IWF Workstation (owned by ISS) - \$2k per quarter
- ▶ Morningstar's FossilFreeFunds.org – carbon tracking and fossil free exposure for mutual funds
- ▶ My4 – online resource (in development)
- ▶ IRIS taxonomy – From the GIIN

### New Framework in Development

- ▶ UN Sustainable Development Goals - new framework for looking at impact

### Example of Impact Fund Managers

- ▶ DFA and Aperio - negative & positive screening managers

### Example of Proxy & Dialogue Options

- ▶ As You Sow - dialogue with public companies Proxy Voting - example of Aperio and DFA's voting record

### Publications

- ▶ Public Equity and Impact Investing – The ImPact
- ▶ Deutsche Bank: ESG and Financial Performance from 2000 empirical studies  
[https://www.db.com/newsroom\\_news/2016/ghp/esg-and-financial-performance-aggregated-evidencefrom-more-than-200-empirical-studies-en-11363.htm](https://www.db.com/newsroom_news/2016/ghp/esg-and-financial-performance-aggregated-evidencefrom-more-than-200-empirical-studies-en-11363.htm)