

Mix & Match: Thematic SMAs

ADASINA SOCIAL CAPITAL

Social Justice U.S. Large Cap

With a mission to deliver large-scale, systemic change via the markets, the firm serves a unique bridge between social justice and the financial system

KBI GLOBAL INVESTORS

Global Sustainable Infrastructure

Differentiated by uniting ESG and infrastructure capabilities, KBI offers exposure to energy, water and agribusiness at lower fees than private markets

WATER ASSET MANAGEMENT

Global Water Equity Fund, LP

The only exclusively water-focused investment firm with both public and private equity experience, benefiting from deep industry relationships

WELLINGTON MANAGEMENT

Climate Resilience

One of few managers using sophisticated physical climate risk data, alongside expertise from 80+ climate scientists at the Woodwell Climate Research Center

	ADASINA SOCIAL CAPITAL	KBI GLOBAL INVESTORS	WATER ASSET MANAGEMENT	WELLINGTON MANAGEMENT
	Social Justice U.S. Large Cap	Global Sustainable Infrastructure	Global Water Equity Fund, LP	Climate Resilience
DESCRIPTION / THESIS	<p>U.S. large-cap strategy aligned with social justice values and integrating financial activism</p> <p>The universe is screened through Adasina's 40+ social justice screens and 80+ metrics, comprising proprietary and community-sourced social justice datasets and commercial ESG information</p>	<p>Global all-cap strategy with competitive yield, lower correlation to traditional equity benchmarks, and consistent historical performance, targeting 3.5-4.5% dividend yield</p> <p>Invests in sectors uncommon in most infrastructure strategies. Primary themes: Energy, water, agribusiness solutions</p>	<p>Global SMID strategy with U.S. bias investing exclusively in companies and assets that grow earnings by ensuring reliable water quality and supply</p> <p>Water is the ultimate expression of climate change given the impact on hydrological cycles, driving the need for water-related investment</p>	<p>Global all-cap seeking long-term capital appreciation from stocks addressing physical climate risk through adaptation to, and protection from, climate change</p> <p>Companies are poised to help adapt to changes across the livability spectrum: from existence to comfort to thriving</p>
HOLDINGS	40-50 Equities	35-50 Equities and ADRs	25-35 Equities and ADRs	15-40 Equities
BENCHMARK	Russell 1000	S&P Global Infrastructure Index	MSCI ACWI	MSCI ACWI
REGIONS	U.S.	U.S., Europe, EM, Japan	Global, U.S. bias	Global, U.S. bias
SECTORS	IT, Health Care, Financials, Industrials, Comms Services, Cons Disc, Cons Staples	Utilities, Infrastructure CAPEX, Asset Owners	Utilities, Infrastructure, Water Tech, Water Treatment, Ag	Unconstrained
MANAGER EXCLUSIONS*	Adasina Social Justice Investment Criteria (Racial, Gender, Economic, and Climate)	N/A	N/A	N/A
FEES & MINIMUMS	80 bps / \$100,000	70 bps / \$100,000	70 bps / \$100,000	80 bps / \$100,000
ACCESS	Available on multiple custodians via Natixis			

*Custom exclusions (e.g., individual equities, sectors, ESG ratings/topics) can be added at the individual account level via the Natixis platform

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