

Socially Responsible Investments at Work

Socially Responsible Investment (SRI):
Offer quality asset management resulting from a strict and responsible methodology approved by specialized and professional associations.

With more than 25 years of experience in asset management, we are convinced that investing in a superior and sustainable business model enables us to create long-term value for our clients. We also consider that the quality of a company is addressed on extra-financial criteria, such as the interactions with its employees, with the environment and with the society it is integrated in.

*Our new **Socially Responsible Investment** methodology fits perfectly within CapitalatWork's investment philosophy as our selection process already takes into account extra-financial criteria on top of financial ones.*

The responsible investment methodology is two-stage. From the companies covered by our team of analysts and fund managers, a **negative screening** allows to disregard companies with attributes we judge undesirable. As such, companies found not compliant with the UN Global Compact 10 principles, operating in controversial sectors or linked to strong controversies will not be considered. The next step involves a **positive screening** and entails the selection of companies considered Best-in-Class alongside an ESG scoring system. Working with a tool developed by an expert in ESG analysis, we are capable of attributing each company a score on environmental, social and corporate governance criteria. The top performers, both from a financial and extra-financial point of view, will therefore be considered the best investment candidates.

Integrating those factors into our initial investment philosophy ensures that only companies with strong Sustainability/Responsibility attributes constitute our portfolio.

This selection process is easily implemented within CapitalatWork since we only focus on strong companies with sound future prospects. Through our Socially Responsible Investment policy, we are able to follow our convictions and offer our clients the possibility to invest responsibly.

Associate Member of



UN Global Compact



Sectorial exclusion



Controversy exclusion



Best-in-Class security selection

