

**BOSTON COMMON**  
ASSET MANAGEMENT, LLC

**More for Mission: Expanding the Field**

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# Sustainable and Responsible Investment Returns

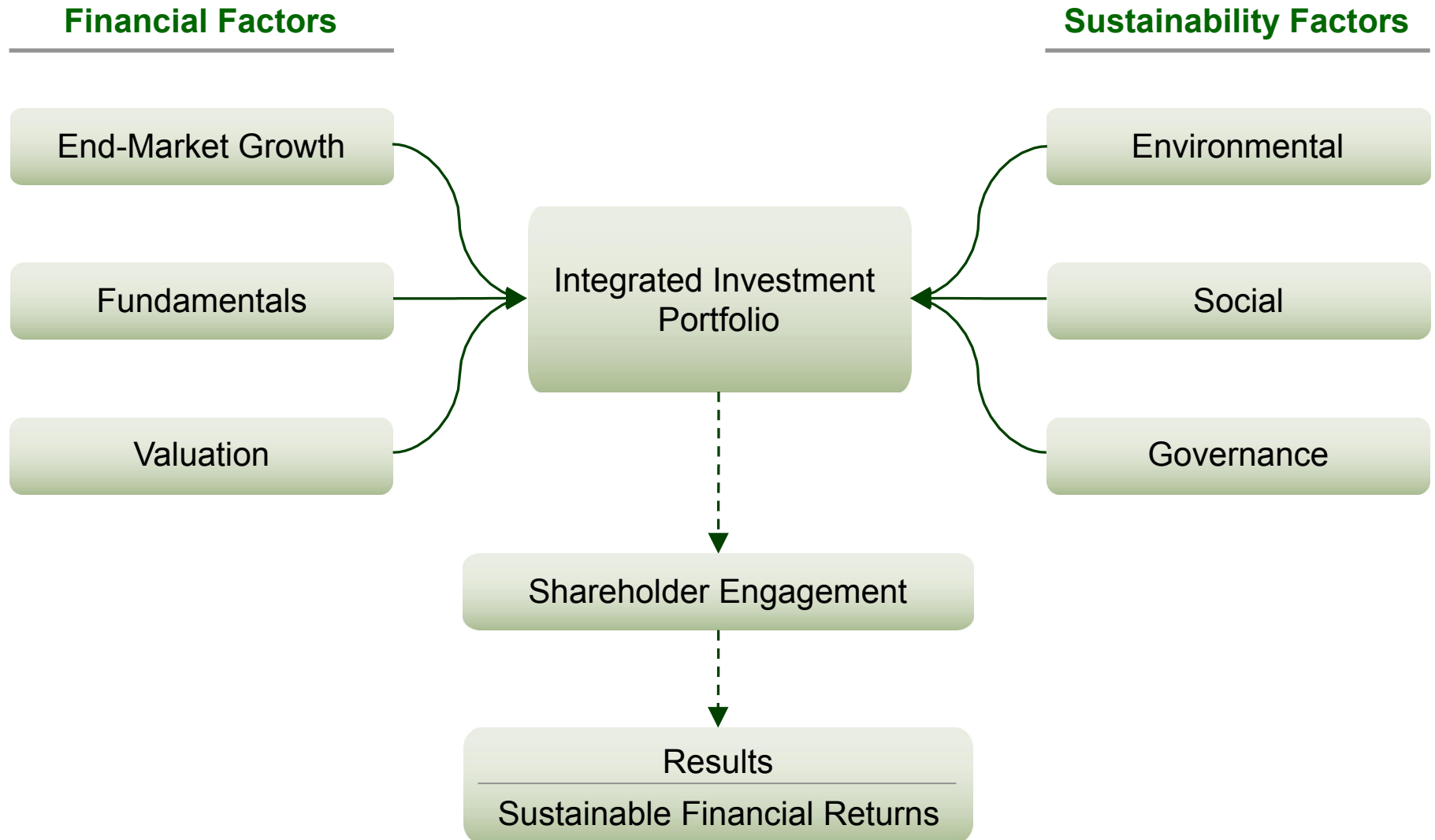
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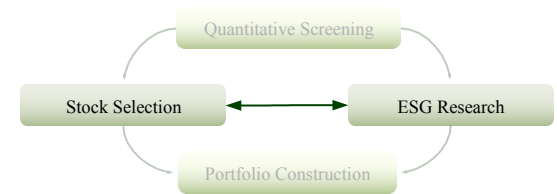
- Our experience shows that investment returns are compatible with sustainability concerns
- Responsible managers do need to make the additional effort to maintain diversification and return potential in ESG portfolios
- Some believe that the current environment is particularly favorable to ESG integrated investing: better returns, and more advocacy success

# Integrated Investing

## Financial Return & Social Change



# ESG Investment Integration



## Investment Opinion

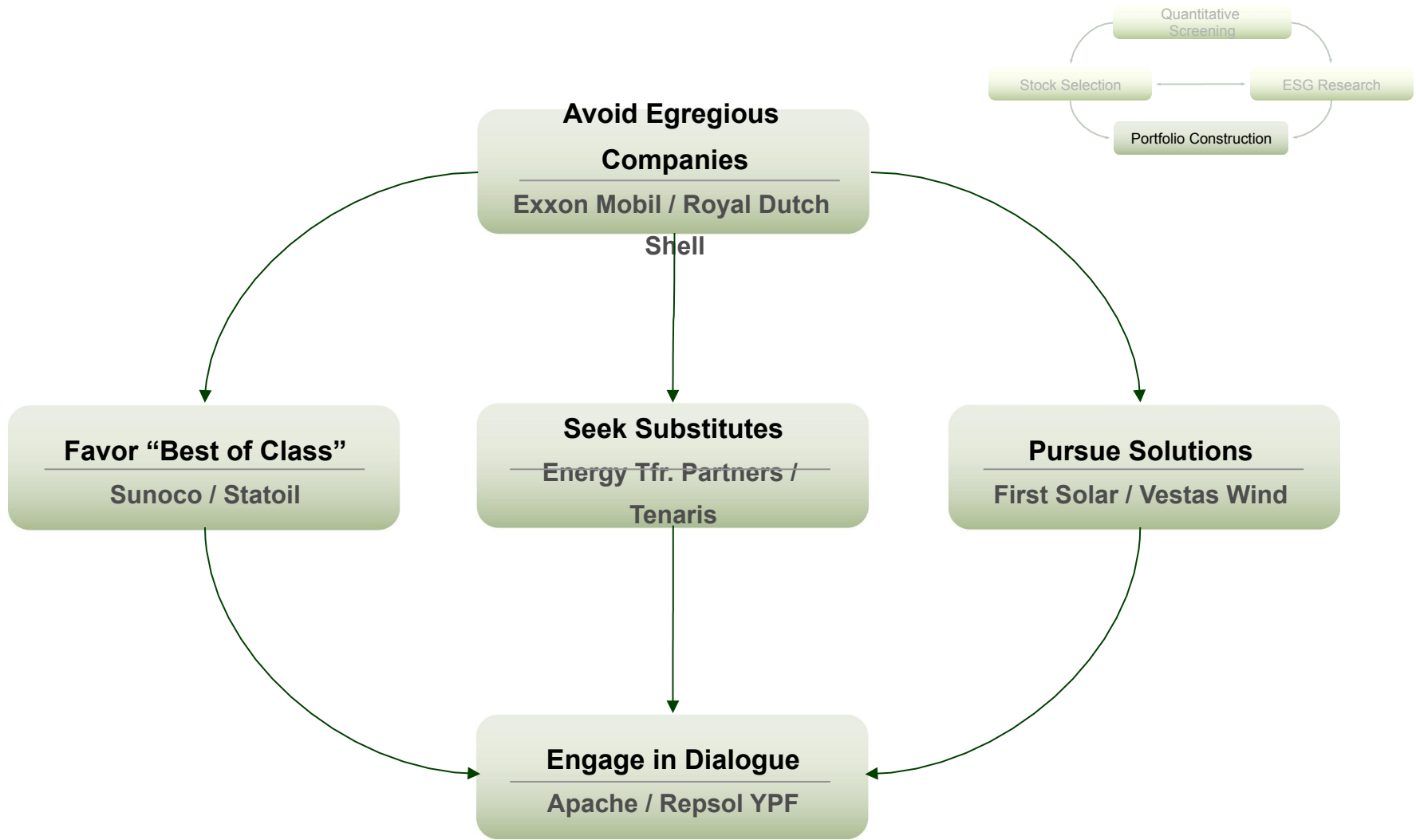
ESG Opinion

	Weak	Strong
Strong	<b>SunPower</b> <b>Banco Compartamos</b>	<b>Praxair</b> <b>Sims Metal Management</b>
Average		<b>Cisco Systems</b> <b>Adidas</b>
Weak		

*The information provided in this report should not be considered a recommendation to purchase or sell any particular security. There is no assurance that the securities discussed herein will remain in the account's portfolio at the time you receive this report or that securities sold have not been repurchased. The securities discussed do not represent an account's entire portfolio and in the aggregate may represent only a small percentage of an account's portfolio holdings. It should not be assumed that any of the securities transactions or holdings discussed were or will prove to be profitable, or that the investment recommendations or decisions we make in the future will be profitable or will equal the investment performance of the securities discussed herein.*

# Portfolio Construction: A Holistic Approach to Challenging Sectors

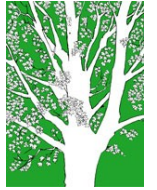
## Example: Energy Sector



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# ESG: Integral to Successful Investing

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- Rapid growth of Emerging Markets: Resource constrained world
- Changing GDP Composition in developed countries
- Significant costs to lapses in good governance
- Benefits of integrated, long-term, and activist investing
- Other metrics for performance:
  - Portfolio Profile
  - Engagement Success