

Sustainable Investing

Align your portfolio to your personal values

Eagle Strategies LLC



Globally, ESG fund assets rose to $3.9 trillion in 2025: a 22% increase from the previous year ($3.2 trillion).[1]



"Doing good while doing well" is the ultimate win-win. Aligning your investment portfolio to your personal values used to require settling for a lesser return. Now, thanks to new strategies and due diligence approaches, that's no longer the case.

A recently published study found that over a 17-year period, companies with higher Environmental, Social, and Governance (ESG) ratings have significantly outperformed their lower-rated counterparts—due primarily to better earnings fundamentals. This outperformance persisted even during times of market crisis.[2]

It's a key reason why, despite the current political headwinds, the vast majority of investors (86%) expect the percentage of sustainable assets in their portfolios to increase over the coming years.[3]:

7,064

NUMBER OF GLOBAL ESG FUNDS[1]

$40T

TOTAL GLOBAL ESG ASSETS PREDICTED BY 2030[4]

[1] Morningstar Global Sustainable Fund Flows, February 2026.
[2] "ESG Ratings in Global Equity Markets: A Long-Term Performance Review," MSCI Journal of Impact & ESG Investing, Fall 2025.
[3] Morgan Stanley's 2025 Sustainable Signals survey, November 20, 2025.
[4] Bloomberg, "Global ESG Assets Predicted to Hit $40 Trillion by 2030 Despite Challenging Environment," February 2024.

What Is ESG?

Rather than excluding certain investments from your portfolio based on moral or ethical concerns, an ESG strategy seeks to employ carrots rather than sticks to encourage greater social responsibility. Typically, ESG investors pay close attention to the following factors when considering where to allocate their investment dollars:

ENVIRONMENTAL

How much effort is the company making to positively impact climate change? Are they committed to reducing greenhouse gas emissions, energy usage, resource depletion, and pollution?

SOCIAL

Is the business attentive to the health and safety of its employees? Are the firm's leaders striving to create greater workforce diversity? Does the company engage with and give back to the community?

GOVERNANCE

How much transparency does the public have into the business' actions? Does the company have a track record that's free of any financial or ethical scandals? Is the board of directors well-structured and diverse?

More and more companies are stepping up to meet the challenge. Why? Because high ESG scores can help improve employee retention—as well as earn more committed and passionate customers.[5]

Additionally, younger workers and consumers tend to be considerably more attentive to corporate behaviors than their older peers. There's a growing expectation that businesses should take a stand on key ESG issues, and with the pervasiveness of social media, it's never been easier to punish perceived bad behaviors.



[5]"The Impact of ESG on Consumer Trust and Loyalty: How Sustainable Practices Influence Consumer Behaviour and Brand Loyalty," Director's Institute, February 2025.



ENVIRONMENTAL

Climate change
Resource depletion
Waste
Pollution
Deforestation

SOCIAL

Human rights
Modern slavery
Child labor
Working conditions
Employee relations

GOVERNANCE

Bribery and corruption
Executive pay
Board diversity & structure
Political lobbying & donations
Tax strategy

Responsible Can Be Profitable

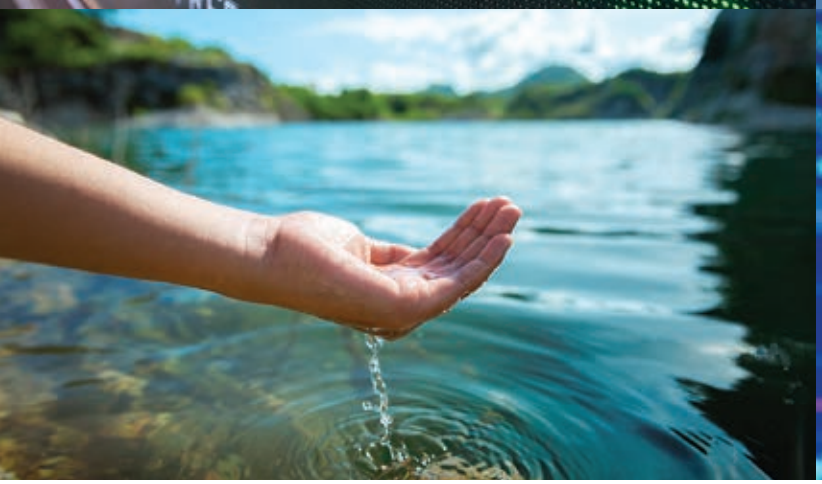
There's a common and lingering misconception that pursuing an ESG investing strategy requires sacrificing return potential. This dates back to the days of "sin stocks," where investors would exclude any investments in certain industries or sectors (e.g., alcohol, tobacco and firearms manufacturers, casinos, etc.). Because this limited the universe of potential investments, it often led to lower returns.

In reviewing and analyzing over 1,400 independent studies conducted over the past decade, researchers have found consistently positive correlations between a strong corporate commitment to ESG and improved return on equity (ROE), increased stock price, stronger operational efficiency, and better risk management.[6]

More socially responsible and sustainable businesses not only tend to endure, they're often more profitable. In fact, since its initial launch in December 2020, the S&P 500 ESG Elite Index has posted an average annualized return of 12.27% compared to a 12.08% average annual return of the broader S&P 500 Index.[7]





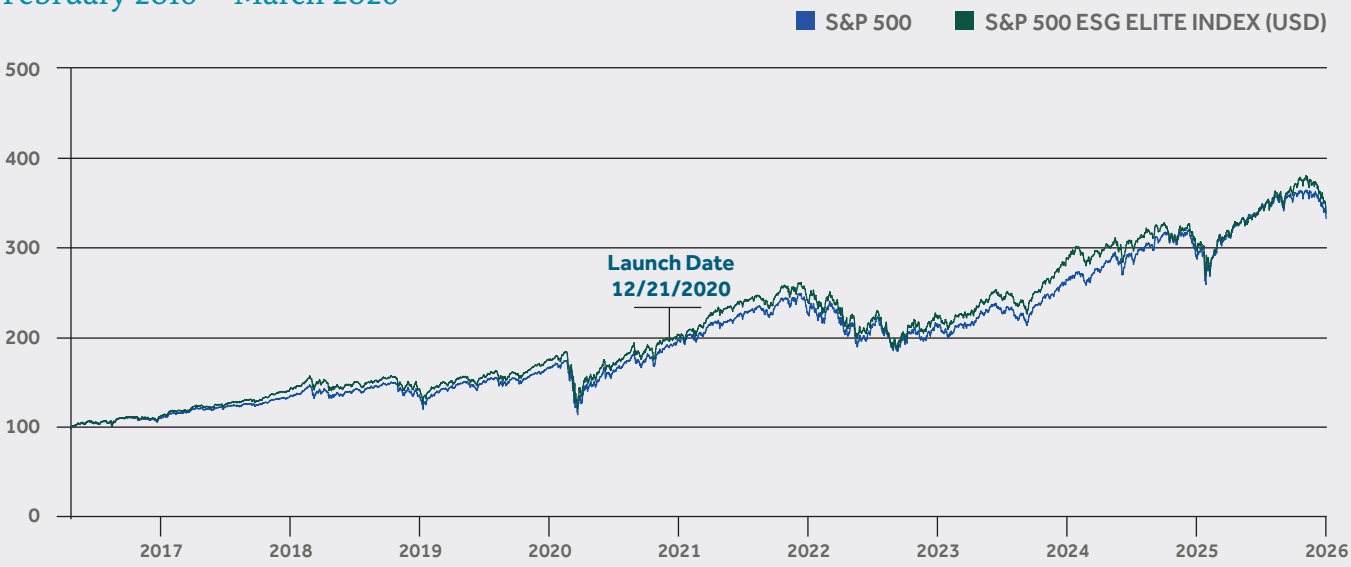




[6] NYU Stern Center for Sustainable Business, Return on Sustainability Investment (ROSI) Database, Accessed March, 2026.
[7] S&P Global Data as of March 27, 2026. The S&P 500® ESG Elite Index is designed to measure the performance of securities meeting strict sustainability criteria, while maintaining similar overall sector weights as the S&P 500.

Slight but Steady Outperformance Over a 10-Year Period

February 2016 – March 2026



Source:S&P Global, March 2026.











88% of investors globally are interested in pursuing sustainable investing.[8]

[8] Morgan Stanley 2025 Sustainable Signals Report, April 2025.

Our Sustainable Investment Lineup

At Eagle Strategies, we're able to provide you with access to a suite of sustainable investment options from some of the industry's most recognized and respected names. In addition to a wide range of ESG-focused mutual funds and exchange-traded funds (ETFs), we maintain special relationships with several of the nation's leading third-party ESG asset managers.

Whether you're simply looking for broad exposure to sustainable investments or prefer to take a more targeted approach that incorporates specific thematic strategies, we can work with you to identify an appropriate solution.

We engage in extensive and thorough quantitative and qualitative reviews of all our sustainable investment managers, while providing rigorous ongoing oversight.







Integrating a Sustainable Strategy into Your Financial Plan

Sustainable investing is by no means an all-or-nothing proposition. In fact, it's never been easier to allocate a portion of your portfolio in accordance with your values. Perhaps you'd prefer to dip your toe into the water by:

- Incorporating ESG into your future investments
- Selling some existing assets and redeploying the proceeds toward an ESG strategy
- Setting up a separate ESG or Impact portfolio

Sustainable investing is here to stay, and there's a tremendous amount of momentum that should help keep the strategy of "doing well by doing good" evolving far into the future.



We are ready to work with you

We're committed to building strong planning relationships that help you achieve your financial goals. Providing you with exclusive access to a comprehensive lineup of carefully selected investment strategies is essential to the success of that mission.



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INVESTMENT. ESTATE.

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