



What is Values-Based Investing?

We can help you make investments you'll feel good about.

As an investor, you are an owner or creditor in the companies you invest in, and you have certain rights and responsibilities. More and more, your investments are viewed as a witness to your values.

Values-based investing, also called Environmental, Social and Governance (ESG) or socially responsible investing, essentially means that some degree of non-monetary metrics are factored into your investment decisions.

This doesn't necessarily mean sacrificing financial returns, but simply that the evaluation of a company includes more factors than can be measured in dollars.

The Presbyterian Foundation has been a pioneer in values-based investing strategies for more than 50 years, and NCTC has continued to build upon this legacy. Consistent with our faith heritage, we have the expertise to customize a portfolio that mirrors the Church's Social Witness Policies for Investments, and aligns with the values that are most important to you.

When building a values-based investing portfolio, we take a comprehensive approach, which may include negative screening, positive integration and impact investing. NCTC can help you build and execute these strategies based on your specific values. We also help to drive impact once you are a shareholder, through corporate engagement and proxy voting.

As more and more investors integrate values-driven factors into their investment decisions, companies will continue to feel the pressure to maintain best practices. Not only that, our research continues to suggest that over long periods of time, expected returns are very similar to market rates of return for these strategies.

We're proud to offer values-based strategies because it is our calling as part of a Church agency. There is no additional cost for these services.



Fossil fuel free strategy

NCTC offers a passively managed strategy that seeks to closely track the S&P 500 index, while divesting fully from the energy sector and fossil fuel industry. Social screens are also applied to exclude alcohol, tobacco, weapons, for-profit prisons, casinos and human rights violators.

Diversity, equity & inclusion strategy

A large cap U.S. stock portfolio tracking the Russell 3000 index, targeting investment in companies with a history of strong diversity, equity and inclusion efforts that are faithful to the divestment list of the General Assembly of the Presbyterian Church.

New Covenant Funds

New Covenant Trust Company provides shareholder and social witness services to New Covenant Funds, a mutual fund family.* New Covenant Funds strives to comply with the social witness principles and supports the mission of the Presbyterian Church.

*New Covenant Funds are sponsored by SEI and advised by SEI Investments Management Corporation (SIMC).

A negative screening strategy

involves divesting from industries or companies incompatible with an investor's values.

Positive screening

involves measuring companies on an array of metrics and highlighting those that are best-in-class performers within their industry.

Investment products such as stocks, bonds and mutual funds are: NOT FDIC INSURED | NOT BANK GUARANTEED | MAY LOSE VALUE | NOT A DEPOSIT
NOT INSURED BY ANY FEDERAL AGENCY | NOT GUARANTEED BY NEW COVENANT TRUST COMPANY (NCTC)