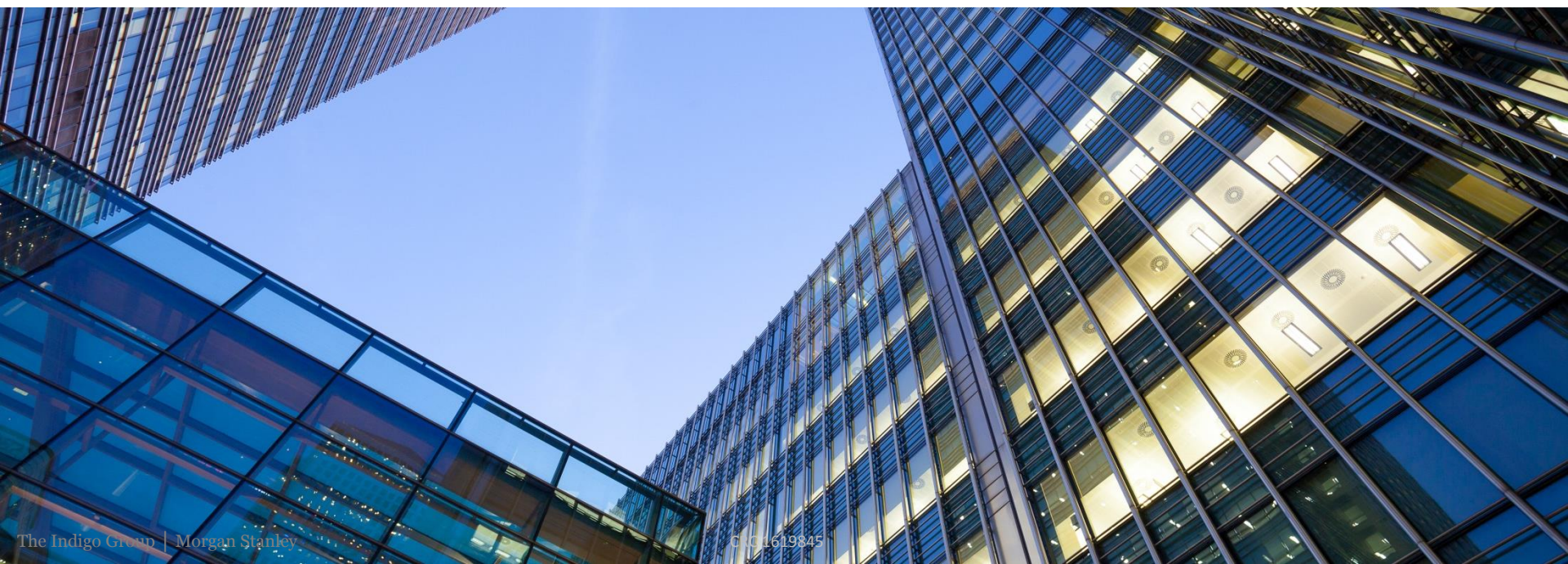


**Morgan Stanley**



**The Indigo Group**

**Investing with Impact Champions**





## **The Indigo Group at Morgan Stanley**





## **The Indigo Group at Morgan Stanley**

The Indigo Group at Morgan Stanley believes that capital creates change in the world. Our focus is to work with institutions and individuals in helping create scalable finance solutions that seek to deliver competitive financial returns while driving positive environmental and social impact.

**(Passion + Profession + People + Planet + Profit)**

We believe

...investing should provide positive returns

...business should be honest and transparent

...companies should report on materiality

...we should be working together

## Investing with Impact Champions



The Impact Champions contribute to Morgan Stanley's Investing with Impact Platform with defined leadership responsibilities to the firm, which are:

- Provide critical feedback on current platform offerings and strategy for future development
- Help develop education and marketing approach for the field and broader market
- Promote the Investing with Impact Platform through internal and external channels
- Time commitment: participate in person at Impact Champions gatherings and quarterly virtual meetings to help shape solutions

We believe that ESG principles will be incorporated into almost all investments in the future. Looking back, I can see a time when my grandkids might say, 'You mean you knowingly invested in companies that were polluting or using sweatshop labor?'" - *Mark Callaway, The Indigo Group at Morgan Stanley*

*\*ClearBridge Investments Environmental, Social and Governance Investing, First Quarter 2015 publication*

# The Investing with Impact Component



## Morgan Stanley Institute for Sustainable Investing

- In November 2013, Morgan Stanley established the Institute for Sustainable Investing as a concentrated effort to mobilize market-based solutions to economic, social and environmental challenges
- The Institute is guided by an Advisory Board, comprising prominent leaders from business, academia and leading NGOs
- The Institute's Advisory Board is chaired by James Gorman, Morgan Stanley's Chairman and CEO



“Morgan Stanley is in a unique position to help address the most pressing challenges facing society today by harnessing the capital markets. We aim to facilitate the flow of capital between investors and businesses to help foster sustainable growth and opportunity.”

*James Gorman, Morgan Stanley Chairman and CEO*

- 5-yr goal of \$10 billion in total client assets in investments that seek to deliver market-rate returns and positive environmental and social impact
- Commitment of \$1 billion in a sustainable communities initiative to provide rapid access to capital for the preservation and enhancement of quality affordable housing
- New product development by Morgan Stanley Investment Management's Long-Only and Alternative Investment Partners businesses, in which positive social and/or environmental impact is a core part of the underlying investment strategy
- Sustainable Investing Fellowship with Columbia Business School to develop a cadre of emerging leaders in sustainable finance
- Sustainable Investing Challenge with Kellogg School of Management at Northwestern and INSEAD for students at business schools and other graduate programs globally to create institutional-quality investment vehicles that aim to solve economic, social or environmental challenges and generate competitive financial returns