

## **William Blair Investment Management Announces U.S. Sustainability Strategy**

### **Finding sustainability aligned companies across the market-cap spectrum**

1 February 2022 - William Blair Investment Management today announced the William Blair U.S. All Cap Growth SICAV strategy has become the William Blair U.S. Equity Sustainability SICAV strategy to more accurately reflect the fund's investment objectives and recognize positive sustainability characteristics. The firm has U.S.\$2.1 billion<sup>1</sup> invested in its U.S. growth and core equity SICAV strategies.

The strategy reflects growing client demand for green investment products and follows the continued integration of ESG factors into William Blair Investment Management's fundamental analysis. The fund aims to capitalise on the team's vast experience in identifying durable businesses trading at attractive valuations, while also promoting positive sustainability characteristics.

The fund, managed by David Fording, offers broad exposure to U.S. companies that exhibit quality characteristics and that are positively aligned with sustainability trends in a high-conviction portfolio of 30 to 50 stocks. The portfolio invests across the market capitalisation spectrum, deliberately inclusive of small- and midcap companies. This emphasis on smaller businesses allows the investment team to identify those companies not yet on the radar of many other sustainability-focused investors, thus seeking to exploit potential mispricing opportunities.

In addition, the portfolio seeks to include companies aligned with a range of themes including decarbonization, health and well-being, and the circular economy and investments meet at least one of three sustainability criteria:

- Enablers -- companies whose products or services contribute to positive social or environmental outcomes
- Champions -- companies that operate their businesses in accordance with high ESG standards
- Improvers -- companies that have demonstrated a commitment to improving ESG profiles

The fund is categorised as Article 8 under SFDR.

### **David Fording, CFA, Partner and Portfolio Manager at William Blair Investment Management, comments:**

"Having evolved our ESG integration model over recent years, we're pleased to offer a dedicated sustainability strategy in our suite of U.S. equity funds. We believe there is a great opportunity to identify companies that are contributing to more positive outcomes for stakeholders and the planet and whose stocks are mispriced. Using our team's extensive experience in fundamental analysis of companies, we look to achieve superior returns while also reflecting our clients' demand for more sustainable and environmentally friendly investment options."

The fund also excludes companies that violate the U.N. Global Compact principles, companies whose primary business is the production of fossil fuels, tobacco, controversial weapons, alcohol, gambling or adult entertainment.

**Notes to editors**

<sup>1</sup> As at 31 December 2021

**Biography**

**David C. Fording**, CFA, partner, is a portfolio manager for William Blair's U.S. Equity Sustainability and All Cap Growth strategies. From 2010 to 2011, he also served as co-director of global research for investment management. Before joining William Blair in 2005, David worked at TIAA-CREF Investment Management, where he was a portfolio manager for the Mid Cap Growth Fund for two years, an equity analyst covering global media and entertainment stocks for five years, and a member of the large-cap growth portfolio management team for two years. He is a member of the CFA Institute and the CFA Society Chicago. In addition, he holds the SASB Fundamentals of Sustainability Accounting (FSA) credential. David received a B.A. in economics, summa cum laude, from Tufts University, Phi Beta Kappa, with a certificate in Peace & Justice Studies, and an M.B.A. in finance from New York University's Stern School of Business.

**About William Blair**

William Blair is the premier global boutique with expertise in investment banking, investment management, and private wealth management. We provide advisory services, strategies, and solutions to meet our clients' evolving needs. As an independent and employee-owned firm, together with our strategic partners, we operate in more than 20 offices worldwide.\*

William Blair Investment Management is a premier global investment management boutique, with a sole focus on active management across equity, fixed income, currency and multi-asset strategies. We are a U.N.-Supported Principles for Responsible Investment (PRI) Signatory, Investor Stewardship Group Member (Framework for U.S. Stewardship and Governance), and Signatory to the Japan and Korea Stewardship Codes. We work closely with private and public pension funds, insurance companies, endowments, foundations, and sovereign wealth funds, as well as financial advisors. As of 31 December 2021, William Blair Investment Management manages \$79 billion in assets.

\*Includes strategic partnerships with Allier Capital, BDA Partners, and Poalim Capital Markets Disclosure.

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