



# Archer's Solution for Values Based Investing

Values-based investing gives investors meaningful opportunity to align their portfolio assets with the things that are important to them.

Archer helps managers develop and implement values-based strategies, streamlining processes, and reducing complexities. Technology makes it easy to incorporate investor preferences into separately managed accounts, direct indexing, or model portfolios. Our fully automated process uses integrated technology to apply filters that emphasize, reduce, or eliminate positions within specific themes or industries across thousands of accounts in seconds.

Global Environmental, Social, and Governance (ESG) assets are on track to exceed **\$53 trillion by 2025**, representing **more than a third of the \$140.5 trillion** in projected total assets under management.<sup>1</sup>

## Quick Facts

The number of sustainable funds available to U.S. investors **grew to almost 400 last year — up 30% from 2019.**<sup>2</sup>

**85% of investors** want the ability to select products that are more closely aligned with their personal sustainability interests.<sup>3</sup>

ESG funds captured **\$51.1 billion of net new money** from investors in 2020, a record and more than double the prior year.<sup>4</sup>

<sup>1</sup> Bloomberg, <http://t.ly/kvYU>.

<sup>2</sup> Morningstar.

<sup>3</sup> Morgan Stanley, <https://mgstn.ly/3eYFcpq>.

<sup>4</sup> Morningstar.

# Accelerate Impact with Values Based Strategies

Archer can help investment managers leverage their investment expertise to:

## **DEVELOP CUSTOMIZED VERSIONS OF A CORE STRATEGY**

Choose the characteristics that are most important to investors and the intuitive interface makes it easy to define and update multiple existing models by overlaying the agreed upon ESG characteristics. In addition, filters enable managers to implement new versions of a core strategy with minimal input, giving the strategy time in market to effectively evaluate demand and performance of the nuanced strategy.

## **TEST DRIVE NEW STRATEGIES IN THE MARKETPLACE**

Back testing can give managers and investors an idea of how a values-based overlay will impact returns, change the portfolio's risk profile, and affect their overall investment strategy. Managers can take this a step further by creating dynamic reports and leveraging technology that allows the investor to see the impact.

## **CREATE TRULY PERSONALIZED INVESTMENT EXPERIENCES**

Technology enables managers to address complexity and scale so that they can move from thematic investments to true personalization, helping investors to align with their priorities.

## **STREAMLINE INVESTMENT AND TRADING OPERATIONS**

Managers can implement changes to the core strategy and the technology ensures that all the filters/variations will automatically cascade to the other versions.

Learn more about how Archer helps investment managers streamline operations, launch new products, and enter new distribution channels at

**[archerims.com](https://archerims.com)**