

# 1919 SRI/ESG Catholic Values Equity Strategy



## Strategy Profile: A Multi-Dimensional Approach To Faith-Based Investing

1919 HAS A RICH HERITAGE  
OF INVESTING ACCORDING  
TO THE GUIDELINES OF THE  
UNITED STATES CONFERENCE  
OF CATHOLIC BISHOPS.

### MORE THAN 50 YEARS STRONG IN SRI

1919 Investment Counsel, is an experienced socially responsible manager with a history that can be traced back to 1971. Our history of providing separately managed accounts tailored to our clients' specific SRI and ESG mandates, informs our rigorous, research-driven investment approach.

As of September 30, 2025, 1919 Investment Counsel managed approximately \$25.6 billion in assets, of which approximately \$3.1 billion is for socially responsible investors.

### WITH OFFICES IN

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The **1919 SRI/ESG Catholic Values Equity Strategy** seeks long-term capital appreciation by investing in companies that offer both an attractive investment opportunity and that exhibit business practices that are consistent with the guidelines published by the United States Conference of Catholic Bishops (USCCB).

### SRI CAPABILITIES AND EXPERTISE

At 1919 Investment Counsel, our multi-dimensional approach to socially responsible investing has been refined over the past 50 years. Our research-driven, fundamentally-based investment approach is conducted by a team of 11 investment professionals which includes 3 social impact analysts who utilize a rigorous research process from an SRI, Environmental, Social and Corporate Governance (ESG) and Catholic values perspective.

### ABOUT OUR SRI/ESG PROCESS

Our comprehensive process includes:

- **Values-Based Assessment**

Eliminating companies whose products and/or activities do not meet the guidelines established by the United States Conference of Catholic Bishops.

- **Impact through Investments:** Employing our proprietary positive-impact analysis to identify companies that are contributing in terms of our socially responsible guidelines and mandate.

- **Impact through Engagement:** Proactively communicating with the management of our portfolio companies to encourage positive social change.

Companies in our portfolio are then monitored to ensure they meet both our socially responsible and fundamental criteria on an ongoing basis. ■



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## Disclosure

All investments involve risk, including risk of loss and there is no guarantee investment objectives will be met.

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