

Gender-lens investing for companies, not-for-profit organisations and foundations

Curious about aligning your financial strategy with your corporate purpose?

At Equity JV we assist organisations to actively demonstrate their strategic commitment to gender equality and diversity and inclusion by deploying a gender lens across balance sheet investments. If you are a values-driven organisation, orienting invested capital to your purpose may amplify your strategy and create long-term sustainability and value.

For companies seeking to support their strategy through ESG initiatives and perhaps report these to their investors, gender lens investing strengthens the “S” as well as boosting your own diversity and inclusion workplace policies.

The benefits for organisations may include demonstrating your intent to a gender-equal culture, as well as attracting employees looking for a great place to work

Collaborate

- An initial discussion with the board, CIO/CFO and audit/investment committee as appropriate will introduce the concept of gender impact across financial capital
- We include your investment advisers as collaborators in the conversation and conduct a review of the current investment portfolio
- Relevant governance gateways and investment policy guardrails are addressed as needed
- Uncover the specific focus on gender given your values, purpose, and corporate strategy. This provides guidance on options for alignment

Find your unique approach

- Consider approaches using our access to global best practice
- Some options for a gender lens may include: aligning with the organisation’s D & I policies, supporting the ESG strategy, or demonstrating commitment to particular themes: i.e. women in leadership, the gender pay gap and female entrepreneurs
- Collaborate with your investment advisers to demonstrate how different options could be executed with your investment capital, i.e. a ‘do no harm’ strategy through to catalytic capital
- Recognise and incorporate any liquidity requirements, targeted rates of return

Implement the gender lens strategy

- Work with investment advisers to deploy the gender lens and discuss expectations on timeframe for impact
- EquityJV can also assist boards, audit and investment committees to enhance their engagement with external investment advisers and fund managers to uncover gender impact in investments
- We can assist with internal and external communications to bring visibility to the gender lens, creating stakeholder impact

Strategies

Gender lens strategies to support your corporate purpose

- Ethical investments: include gender indicators
- ESG plus gender: include gender indicators and/or re-weight towards gender impact
- Active shareholder engagement
- Fund managers engagement: introduce reporting to include gender indicators
- Geographic or thematic gender-lens indexes
- Investing to address gender based violence
- Venture Capital with a gender lens

Themes

Investment themes that align to support or amplify your corporate values

- Women on boards and executive teams
- Intersectional advocacy: workplace practices, community and controversies
- Gender and finance: diverse fund managers, advisory, investment teams
- Gender and First Australians: (via businesses and investment vehicles)
- Philanthropy with a gender lens
- Gender-based violence
- Sustainable Development Goals: investments that focus on SDG 5
- Workplace policies: governance, culture, remuneration, recruitment
- Products and services responding to gender inequity
- Red flags: controversies indicate gender unequal practices, gender-based violence
- Regulatory standards reflected in investments: Modern slavery, "Positive Duty" and Non-Disclosure agreements in workplace safety
- Companies amplifying gender equality through their investment guidelines