

Introducing Equity JV

We believe the way that each investor creates and deploys a gender lens across their capital should be unique. We work with clients to create a strategy that aligns with their values and their overall investment objectives. Our focus is on asset classes within a typical portfolio allocation, particularly publicly listed equities, managed funds and ETFs. We assist existing advisers to formulate a gender lens strategy able to be deployed across investments and which can adapt and evolve.

How we work

ASSESS CURRENT STATE

- Work with an investor's existing advisory relationships to introduce and build on gender lens concepts
- Review the current portfolio and investment policy or family charter if relevant
- Understand the client's values and motivations for focusing on gender impact
- No portfolio or adviser? We can assist with an introduction to an aligned adviser

CREATE A UNIQUE APPROACH

- Discuss choices i.e. from using a 'do no harm' strategy through to catalytic capital
- Active screening or active engagement: which is preferred?
- Understand the client's expectations on the timeframe to achieve impact
- Visibility: how a client's external strategy can create impact

DEVISE PORTFOLIO STRATEGY

- Use the investor's preferred approach and collaborate with the adviser to construct the portfolio with a gender lens
- Implementation may be across total portfolio or use a segmented approach, i.e. targeting certain asset classes and/or geographies
- We recognise that there will be sensitivity to existing portfolio assets and goals/adviser's parameters

Strategies

- Invest and Engage: look for strong engagement on gender impact
- Do No Harm: assess and divest
- Ethical investments: include gender indicators
- ESG plus gender: include gender indicators and/or re-weight towards gender impact
- Gender-lens indexes
- Direct engagement with Australian companies on gender
- Impact management framework
- Investing to address gender based violence

Themes

- Women on boards and executive teams
- Intersectional advocacy: workplace practices, community and controversies
- Access to capital: female entrepreneurs and business ownership
- Gender and finance: diverse fund managers, advisory, investment teams
- Gender and First Australians: businesses and investment vehicles
- Philanthropy with a gender lens
- Gender-based violence
- Sustainable Development Goals: 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