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ESG Investing Nomination Form (1 of 2)

Category: Best ESG Investment Fund: Multi-Asset

Category: Most Innovative ESG Product

10/25/22

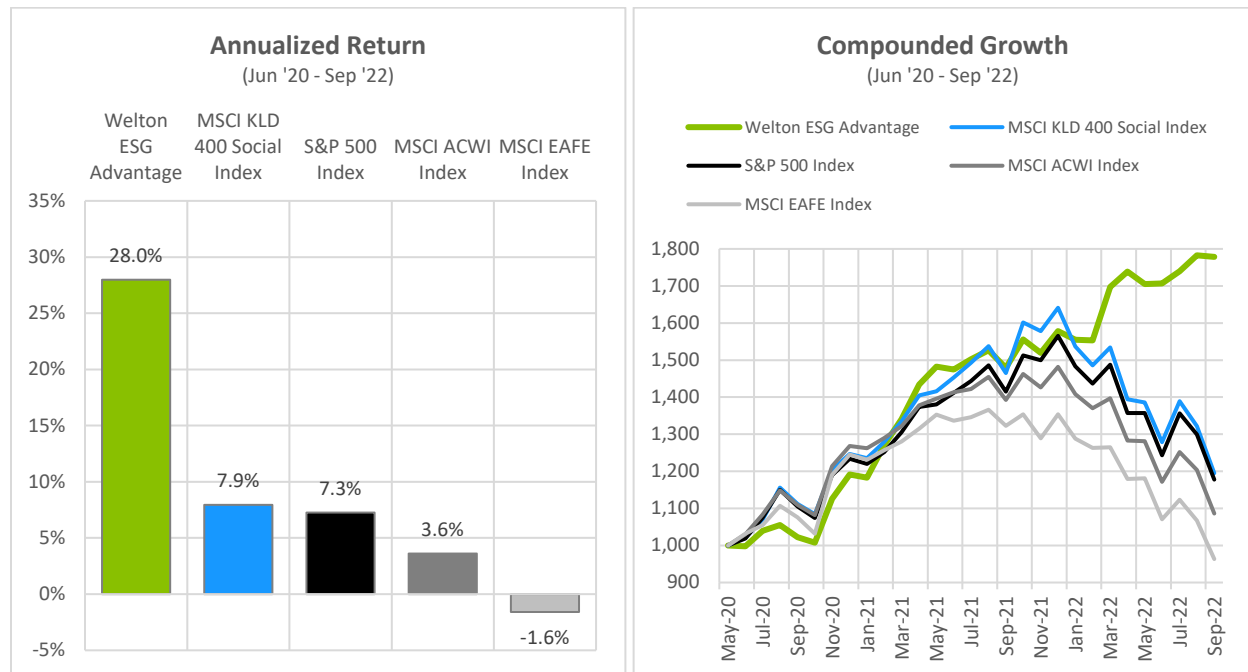
Nominated Co. Type: Hedge Fund
Award Category of Entry: **Best ESG Investment Fund: Multi-Asset**
Name of Nominated Co.: **Welton Investment Partners**
Analyst Name: ---

Primary Contact for Correspondence

Your Name: Christopher Keenan
Job Title: Director of Marketing
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Telephone: +1 (831) 620-6607
Company Name: Welton Investment Partners
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San Carlos between 5th and 6th
P.O. Box 6147
Carmel, California 93921
Country: United States
Postcode: 93921-6147

Nomination Statement:

We nominate **Welton ESG Advantage** for **"Best ESG Investment Fund: Multi-Asset"** for delivering on the program's objective of providing "all weather" performance through favorable and difficult markets alike. By so doing, Welton ESG Advantage offers an investment holding period solution that matches investors' eternal commitment to ESG itself. See performance since inception below.



Welton ESG Advantage was conceived three years ago based on an observation that ESG investing had a problem. As detailed in our whitepaper at the time, "[Solving the ESG Dilemma](#)," we observed that virtually all available ESG investments were long-only equity funds, leaving the movement undiversified, concentrated, and risky. Moreover, ESG funds have historically underperformed the baseline S&P 500 Index.

We posited that we could apply our decades of experience building multi-asset portfolios to better diversify holdings and augment the performance of ESG-screened portfolios. Launched in June 2020, Welton ESG Advantage was one of the first multi-asset ESG offered anywhere.

As one of the first multi-asset ESG programs in existence, ESG Advantage's design required numerous in-house innovations. Because we combine ESG-screened single equities with liquid global financial derivatives, we needed to develop our own ESG scoring framework for these alternative asset classes. We pioneered our own ESG scoring framework based on sovereign ESG scores to assess derivatives and commodities.

We next use a unified ESG allocation framework of our own design that scales exposure based on ESG score strength across all of the portfolio's asset classes, taking into account not only absolute scaled ESG scores, but also ESG momentum to reward sustainability.

We believe the source of ESG Advantage's outperformance over long-only ESG equity peers will be due to the program's multi-asset, diversified, and actively risk-managed design – time-tested sources of greater compounded investment gains.

Supporting Information (files also emailed to info@esginvesting.co.uk)

- See Institutional Investor article published July 6, 2022, "[This Quant Manager Offers a Rarity: An ESG Fund That's Up This Year.](#)"
- Welton ESG Advantage out-performs the top-50 US Equity Large Cap mutual funds and ETFs as listed by Morningstar representing **\$97 Billion in assets**.
 - [See PDF report.](#)
 - [See Excel list of top-50 ESG programs.](#)
- See Welton ESG Advantage [September factsheet](#).
- See Welton ESG Advantage [Q4 presentation deck](#).
- See Welton whitepaper, "[Solving the ESG Dilemma: How to Advance One's Values While Also Improving Performance.](#)"

Other Facts:

- Prime Broker: UBS
- Custodian: US Bank
- Administrator: Citco Fund Administrator
- Auditor: Deloitte & Touche
- Bank: Citco Banking Corp
- Legal Advisor: Katten Muchin Rosenman LLP