

## NEWS RELEASE

### Natixis Investment Managers Launches Mirova US Climate Ambition SMA

- Mirova US Climate Ambition Equity strategy seeks to have a high positive climate impact by making investments that lead to reduced carbon emissions and increased saved emissions, while outperforming the S&P 500
- Strategy's track record extends over four years
- Managed by Mirova, a global leader in impact investing and part of the Net Zero Asset Management initiative

**BOSTON, April 20, 2021** – Natixis Investment Managers (Natixis) today announced the Mirova US Climate Ambition Equity investment strategy is now available to financial advisors and their clients through retail separately managed accounts (SMAs). The strategy is managed by Mirova, an affiliate of Natixis Investment Managers and certified B Corporation dedicated to sustainable investment<sup>1</sup>, and one of only 20 asset managers selected by the Principles for Responsible Investment (PRI) organization to the PRI Leaders Group 2020<sup>2</sup>.

The Mirova US Climate Ambition Equity strategy is a diversified core US equity portfolio with a four-year track record designed to have a high positive climate impact by investing in a diversified range of companies, including companies whose activities will lead to a significant reduction in induced carbon emissions and/or a significant increase in saved carbon emissions. The strategy also seeks to actively invest in firms that derive more than 50% of their revenues from activities with a positive climate impact, which are likely to benefit from a transition to a less carbon-centric economy. The strategy seeks to outperform the S&P 500 within a defined risk budget.

“We believe that investors can outperform the market in the long-term by investing in high-quality companies that will help to reduce carbon emissions and contribute to a more sustainable economy,” said Jens Peers, CFA®, CEO and CIO at Mirova US. “Offering the Climate Ambition strategy as a retail SMA enables advisors and their clients to access it in a format that was previously only available to institutional investors.”

The Mirova US Climate Ambition strategy uses a proprietary quantitative, rules-based approach to portfolio construction, integrating considerations such as a qualitative sustainability analysis of each investment based on environmental, social and governance (ESG) criteria, an assessment of risk factors including those related to energy transition, and fundamental views on companies' climate impact, incorporating an advanced lifecycle approach to the assessment of carbon impact. Mirova is a signatory of the Net Zero Asset Management initiative, and like all of Mirova's equity portfolios, the strategy is aligned with a <2°C global warming scenario, in line with the Paris Agreement<sup>3</sup>.

---

<sup>1</sup> Sustainable investing focuses on investments in companies that relate to certain sustainable development themes and demonstrate adherence to environmental, social and governance (ESG) practices; therefore the Fund's universe of investments may be reduced. It may sell a security when it could be disadvantageous to do so or forgo opportunities in certain companies, industries, sectors or countries. This could have a negative impact on performance depending on whether such investments are in or out of favor.

<sup>2</sup> The Principles for Responsible Investment (PRI) is the world's leading proponent of responsible investment. It began in 2005 when the United Nations invited a group of the world's largest institutional investors to join a process to develop the Principles for Responsible Investment. The Principles were launched in April 2006 at the New York Stock Exchange. Since then the number of signatories has grown from 100 to over 3,000.

<sup>3</sup> Per the Paris Agreement, its goal is to limit global warming to well below 2°C, preferably to 1.5°C, compared to pre-industrial levels.

## NEWS RELEASE

“Client demand for climate-focused investment strategies has never been stronger, and expanding access to the Mirova US Climate Ambition strategy through a retail SMA provides investors with an efficient way to invest in this well-established strategy,” said David Giunta, CEO for the US at Natixis Investment Managers.

The strategy is co-managed by Manuel Coeslier and David Belloc, CFA®, and is managed by Mirova US LLC. Coeslier is a portfolio manager and SRI analyst at Mirova who specializes in measuring the impact of investment portfolios on climate and the energy transition. He led the development of Mirova’s carbon assessment methodology and has been a member of the European Commission’s Technical Expert Group on Sustainable Finance where he particularly worked on climate benchmarks. Belloc is a cross-asset Portfolio Manager at Mirova with more than 20 years of investment experience. Earlier in his career he managed strategies in quantitative equities, smart beta and convertible bonds. The team also draws on a global team of multi-disciplinary specialists and a Responsible Investment Research Team with analysts dedicated to ESG research.

The Mirova US Climate Ambition strategy was previously available through institutional separately managed accounts and will now be available to retail investors through financial advisors via model delivery, single contract and dual contract SMA programs.

Mirova also manages three equity mutual funds available to US investors, the Mirova US Sustainable Equity Fund (MUSYX), the Mirova International Sustainable Equity Fund (MRVYX), and the Mirova Global Sustainable Equity fund (ESGYX). All three strategies are also available to eligible financial advisors and their clients as SMAs. The firm also offers an ESG fixed income mutual fund, the Mirova Global Green Bond Fund (MGGYX).

### **About Mirova**

Mirova is an investment manager dedicated to responsible investment. Through a conviction-driven investment approach, Mirova’s goal is to combine value creation over the long term with sustainable development. Mirova’s experts have been pioneers in many areas of sustainable finance. Their ambition is to keep innovating to create the most impactful solutions to meet their clients’ goals. Mirova manages \$23.9 billion as of December 31, 2020, which includes \$4.96 billion managed by its US subsidiary, Mirova US LLC.

### **About Mirova US**

Mirova US is an SEC registered investment advisor that is a wholly owned affiliate of Mirova. Mirova is operated in the US through Mirova US. Mirova US and Mirova entered into an agreement whereby Mirova provides Mirova US investment and research expertise, which Mirova US then combines with its own expertise when providing advice to clients.

### **About Natixis Investment Managers**

Natixis Investment Managers serves financial professionals with more insightful ways to construct portfolios. Powered by the expertise of more than 20 specialized investment managers globally, we apply Active Thinking® to deliver proactive solutions that help clients pursue better outcomes in all markets. Natixis Investment Managers ranks among the world’s largest asset management firms<sup>1</sup> with nearly \$1.4 trillion assets under management<sup>2</sup> (€1,135.5 billion).

Headquartered in Paris and Boston, Natixis Investment Managers is a subsidiary of Natixis. Listed on the Paris Stock Exchange, Natixis is a subsidiary of BPCE, the second-largest banking group in France. Natixis Investment Managers’ affiliated investment management firms include AEW; Alliance Entreprendre; AlphaSimplex Group; DNCA Investments;<sup>3</sup> Dorval Asset Management; Flexstone Partners; Gateway

## NEWS RELEASE

Investment Advisers; H2O Asset Management; Harris Associates; Investors Mutual Limited; Loomis, Sayles & Company; Mirova; MV Credit; Naxicap Partners; Ossiam; Ostrum Asset Management; Seeyond; Seventure Partners; Thematics Asset Management; Vauban Infrastructure Partners; Vaughan Nelson Investment Management; Vega Investment Managers;<sup>4</sup> and WCM Investment Management. Additionally, investment solutions are offered through Natixis Investment Managers Solutions, and Natixis Advisors offers other investment services through its AIA and MPA division. **Not all offerings available in all jurisdictions.** For additional information, please visit Natixis Investment Managers' website at [im.natixis.com](http://im.natixis.com) | LinkedIn: [linkedin.com/company/natixis-investment-managers](https://www.linkedin.com/company/natixis-investment-managers).

Natixis Investment Managers' distribution and service groups include Natixis Distribution, LLC, a limited purpose broker-dealer and the distributor of various US registered investment companies for which advisory services are provided by affiliated firms of Natixis Investment Managers, Natixis Investment Managers S.A. (Luxembourg), Natixis Investment Managers International (France), and their affiliated distribution and service entities in Europe and Asia.

**Before investing, consider the fund's investment objectives, risks, charges, and expenses. Visit [im.natixis.com](http://im.natixis.com) or call 800-862-4863 for a prospectus or a summary prospectus containing this and other information. Read it carefully.**

Natixis Distribution, LLC is a limited purpose broker-dealer and the distributor of various registered investment companies for which advisory services are provided by affiliates of Natixis Investment Managers. • Natixis Distribution, LLC is located at 888 Boylston Street, Suite 800, Boston, MA 02199-8197 • 800-225-5478 • [im.natixis.com](http://im.natixis.com) • Member FINRA | SIPC

**Equity Securities Risk:** Equity securities are volatile and can decline significantly in response to broad market and economic conditions.

**Foreign and Emerging Market Securities Risk:** Foreign and emerging market securities may be subject to greater political, economic, environmental, credit, currency and information risks. Foreign securities may be subject to higher volatility than US securities, due to varying degrees of regulation and limited liquidity. These risks are magnified in emerging markets.

**Small and Mid-Cap Stocks Risk:** Investments in small and midsize companies can be more volatile than those of larger companies.

**ESG Investing Risk:** The Fund's ESG investment approach could cause the Fund to perform differently compared to funds that do not have such an approach or compared to the market as a whole. The Fund's application of ESG-related considerations may affect the Fund's exposure to certain issuers, industries, sectors, style factors or other characteristics and may impact the relative performance of the Fund – positively or negatively – depending on the relative performance of such investments.

**Currency Risk:** Currency exchange rates between the US dollar and foreign currencies may cause the value of the fund's investments to decline.

<sup>1</sup> Cerulli Quantitative Update: Global Markets 2020 ranked Natixis Investment Managers as the 17th largest asset manager in the world based on assets under management as of December 31, 2019.

<sup>2</sup> Assets under management ("AUM") as of December 31, 2020 is \$1,389.7 billion. AUM, as reported, may include notional assets, assets serviced, gross assets, assets of minority-owned affiliated entities and other types of non-regulatory AUM managed or serviced by firms affiliated with Natixis Investment Managers.

<sup>3</sup> A brand of DNCA Finance.

<sup>4</sup> A wholly-owned subsidiary of Natixis Wealth Management.

###

**Media Contact:**

NATIXIS INVESTMENT MANAGERS

Kelly Cameron

Tel: 617-449-2543

[Kelly.Cameron@natixis.com](mailto:Kelly.Cameron@natixis.com)