



INVESTING FOR GOOD

EXAMINING THE SURGE IN SUSTAINABLE INVESTING

Wednesday, April 7, 2021

As part of Sustainable Investing Day, this virtual panel featured local ESG thought leaders for a discussion on integrating ESG into the investment process, current and emerging trends, and how ESG investing will continue to alter investing across the institutional landscape.



Katherine Collins, CFA, MTS, Head of Sustainable Investing, Putnam Investments

Ms. Collins is Head of Sustainable Investing, where she is responsible for leading Putnam's investment research, strategy implementation, and thought leadership on environmental, social, and governance (ESG) issues. Ms. Collins collaborates with portfolio managers and analysts on ESG integration, assessing the fundamental relevance of ESG issues at a security level, and the potential for alpha generation and risk mitigation at a portfolio level. In addition, she is a portfolio manager of Putnam Sustainable Future Fund and Putnam Sustainable Leaders Fund. Ms. Collins joined Putnam in 2017 and has been in the investment industry since 1990.



Nicole Connolly, Head of ESG Investing & Portfolio Manager, Fidelity Investments

Ms. Connolly is head of Environmental, Social and Governance (ESG) investing and a portfolio manager in the Equity division at Fidelity Investments. In this role, Ms. Connolly leads the Environmental, Social, and Governance (ESG) investment efforts across Asset Management, including helping to direct Fidelity's ESG product roadmap, facilitating greater education about ESG in the investment process, and helping to coordinate the cross-asset class ESG efforts. Additionally, she manages the Women's Leadership Fund. Prior to assuming her current responsibilities, Ms. Connolly served as managing director of research and managed the Energy, Technology, Utilities and Emerging Markets teams.



Eileen M. Durey, CFP, Senior Investment Officer/Head of Sustainable Investing, Hemenway Trust Company

Working closely with the Investment and Trust Committees and HTC's Chief Investment Officer, Ms. Durey assists with the oversight of investment portfolios, recommends portfolio changes, and monitors existing holdings. She develops and integrates financial plans that are aligned with the client's current and future goals and risk tolerance. Ms. Durey also heads the firm's environmental, social, and governance (ESG) research and counsels clients on ESG and Impact Investing. She has more than 20 years of experience performing research and due diligence across multi-asset classes, including traditional equities, socially responsible/impact investing, private equity/early stage, and venture capital allocation.



Karina Funk, CFA, Portfolio Manager; Chair of Sustainable Investing, Brown Advisory

Ms. Funk is a Partner at Brown Advisory, co-portfolio manager of the Brown Advisory Large-Cap Sustainable Growth strategy, and Chair of Sustainable Investing. Ms. Funk joined Brown Advisory in 2009 and has extensive investment experience spanning early-stage ventures to debt and public equities. She and co-portfolio manager David Powell have developed a distinctive fundamental research methodology focused on finding companies at the intersection of positive fundamental and sustainable business drivers. Ms. Funk and her investment team have been profiled extensively in Forbes, Bloomberg, Barron's, the Associated Press, and other investing media. Ms. Funk has also published peer-reviewed articles contributing to the investment literature in Sloan Management Review and the Journal of Environmental Investing. She was recognized as one of Barron's inaugural list of 100 Most Influential Women in Finance in the U.S.