

Mini-series II:

Learn why 72% of Americans are Interested in Impact Investing



Eva Yazhari
Beyond Capital Fund
Co-Founder



Doug Couden, CFA
BakerAvenue Wealth Management
Chief Investment Officer & Partner



Bill Connor, CFA, CFP®, CWS®
BakerAvenue Wealth Management
Managing Director & Partner



Welcome and Introductions:



Eva Yazhari, Co-Founder and CEO of Beyond Capital Fund

- Eva has worked hands on with over 20 entrepreneurs in the start-up stage. She brings to the table the unique understanding of both the investor's and the entrepreneur's challenges and needs. Eva built Beyond Capital to be a recognized global brand. Beyond Capital was named by Ventureburn one of 12 venture investors to know in Africa. Its portfolio improves the lives of 4.1 million individuals living under the poverty line. She also serves on corporate boards, including Frontier Markets and an observer seat at Karma Healthcare.



Doug Couden, CFA, Chief Investment Officer

- Doug is a tested market specialist with multiple cycles under his belt. He leads the firm's multi-disciplined (technical, fundamental and macro) investment approach including BakerAvenue's Impact Strategy . He is a member of the firm's executive committee, is responsible for managing the investment team, the firm's research process, and overall performance of the strategies.



Bill Connor, CFA, CFP®, CWS®, Wealth Advisor

- Bill Connor has 20 years of investment management and financial planning experience with a diversified skill set focused on risk management, investment analysis and retirement income planning. Bill focuses on Socially Responsible Investing (SRI), also known as Impact or ESG investing, and manages our New York office serving the needs of affluent domestic and international families.

BakerAvenue Disclosures

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Different types

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The Momentum



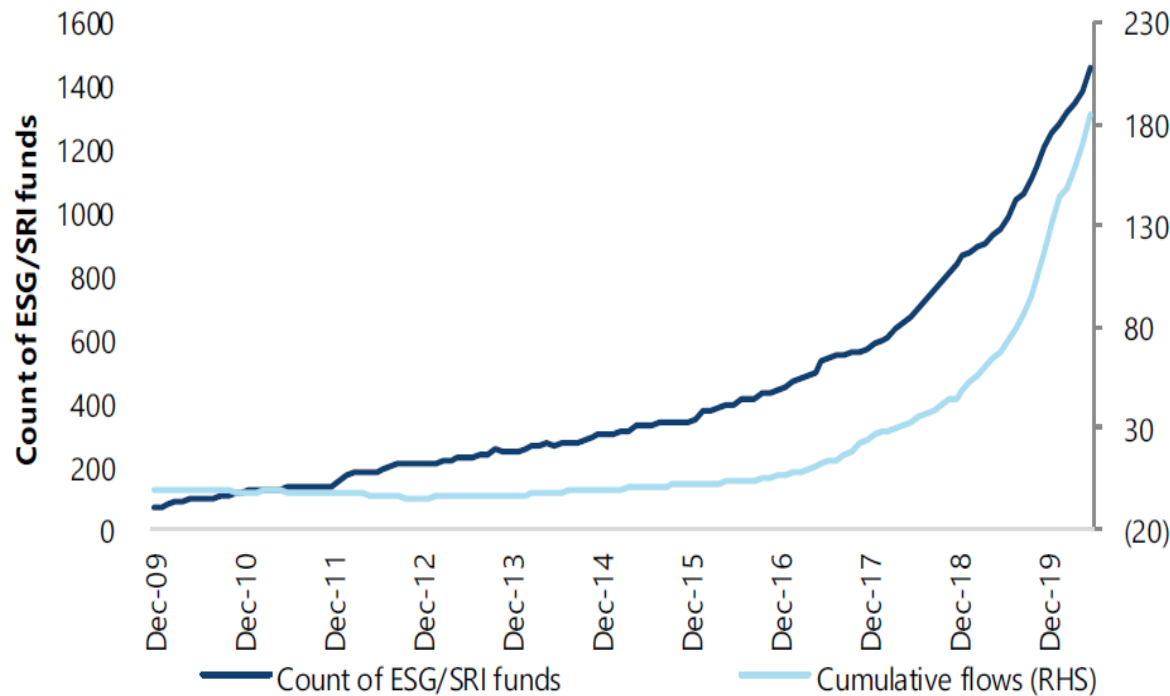
Google Searches for “ESG Investing”



Source: 2010-2020 Popularity of “ESG Investing” search term on Google Trends

Representing search interest related to the highest point on the chart for a given region and time. A value of 100 is peak popularity for the term. A value of 50 means the term is half popular. A score of 0 means there was not enough data on the term.

Rise of ESG / SRI theme continues globally....



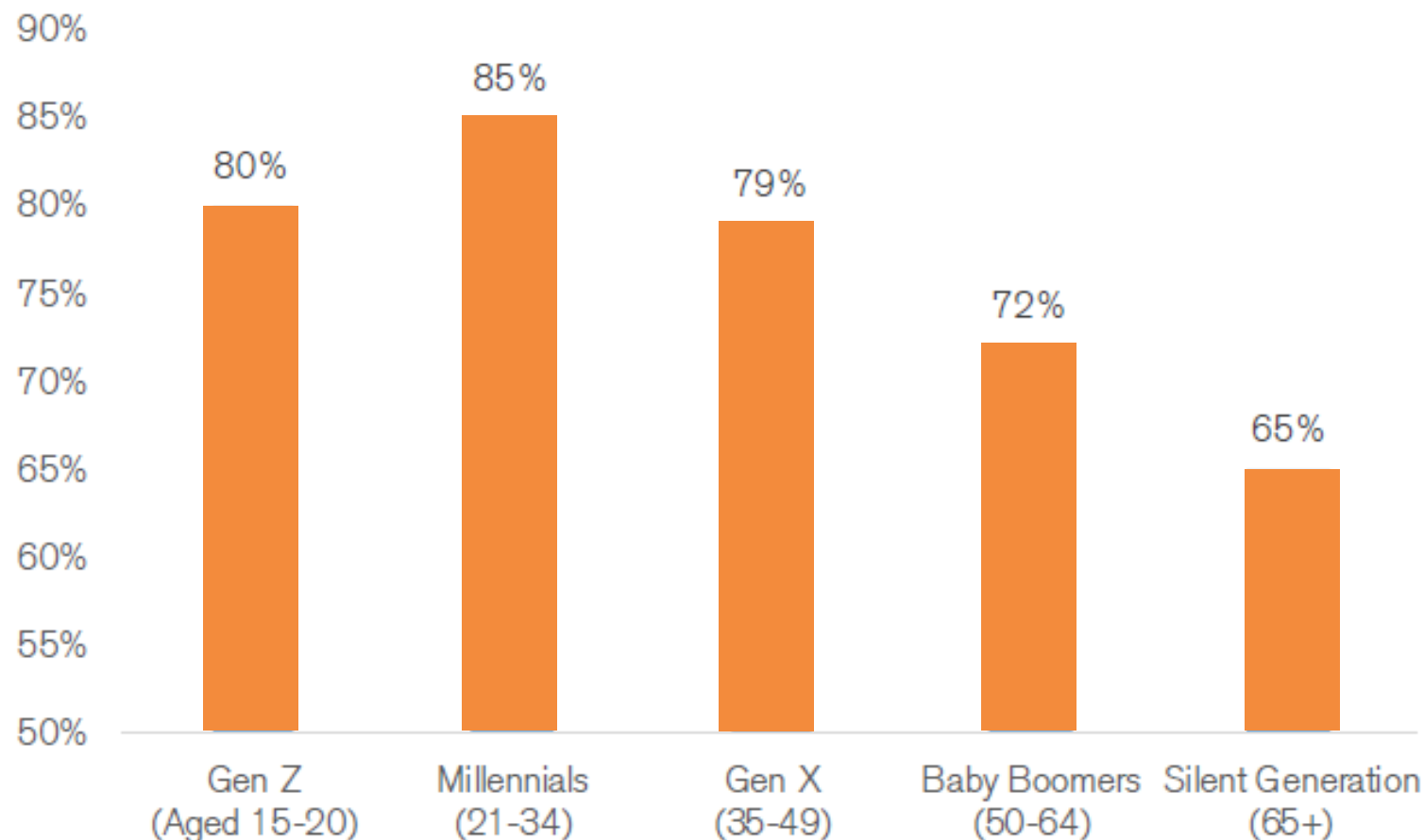
Source: Jefferies, EPFR Global

Societal Shifts

Extremely to Very Important:

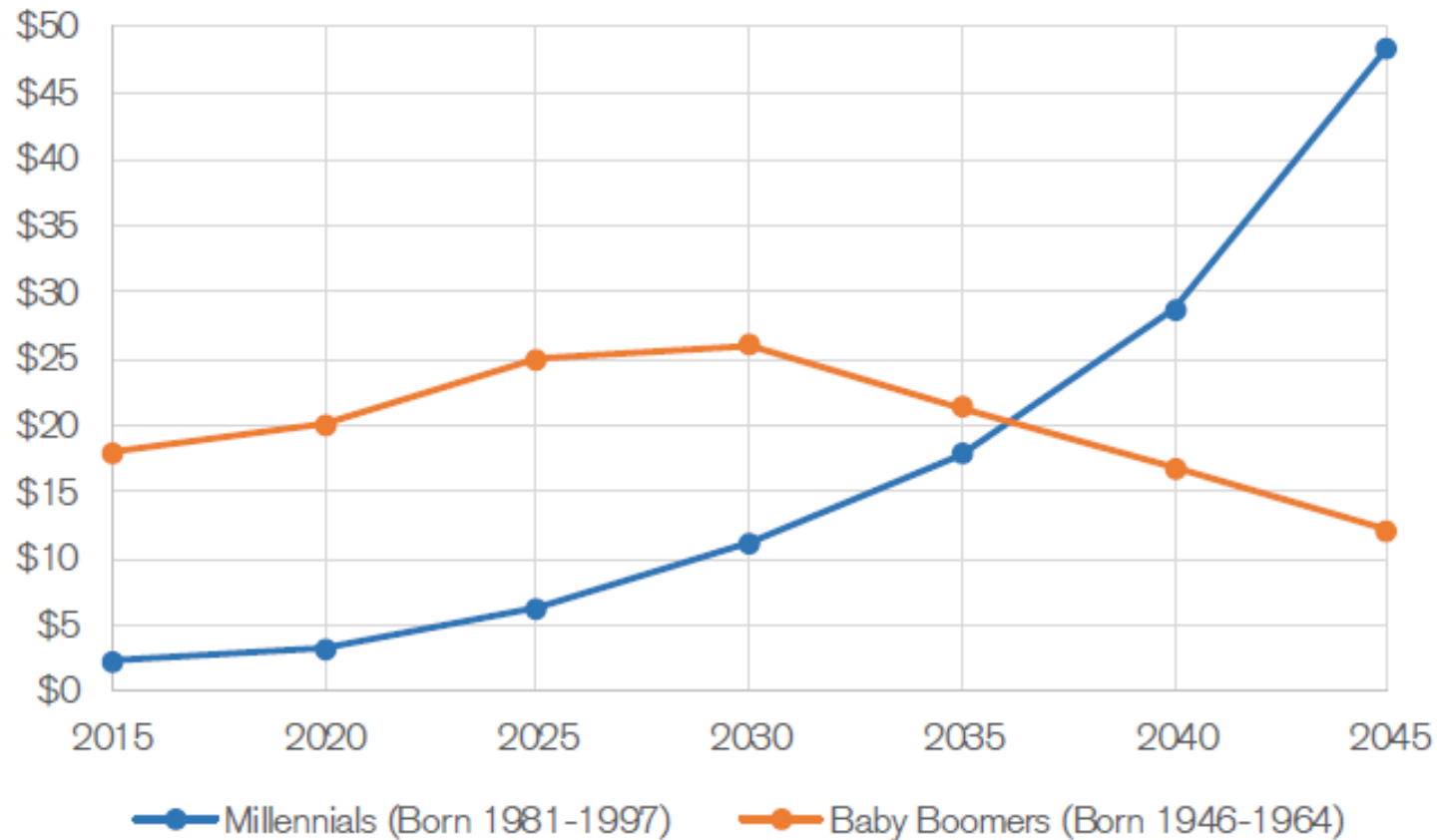


Is it important that Companies Implement Programs to Improve the Environment?



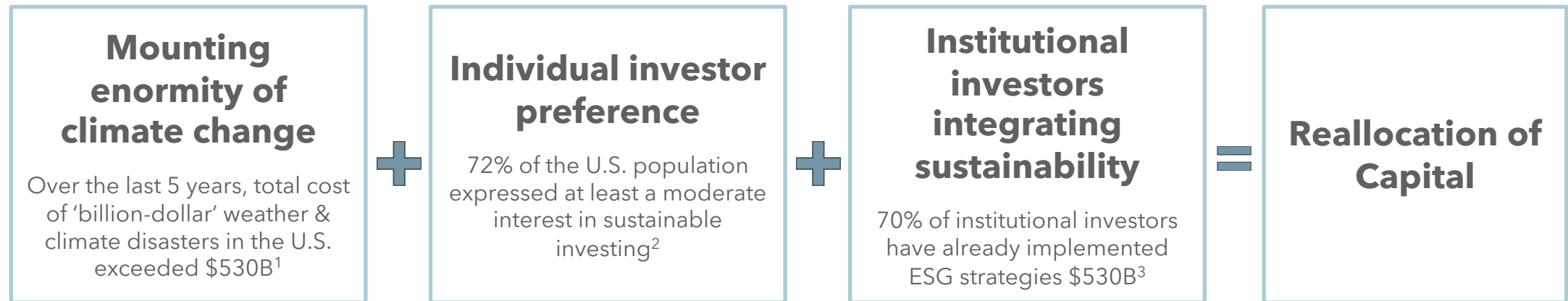
Source: Nelson, Credit Suisse

Wealth Transfer from 2015 to 2045 (in trillions of USD)



Source: Blackrock Investment Institute 9/9/2020

Society's changing attitudes toward sustainability represent a structural shift for investing



¹NOAA. Data covering time period from 2015 to 2019.

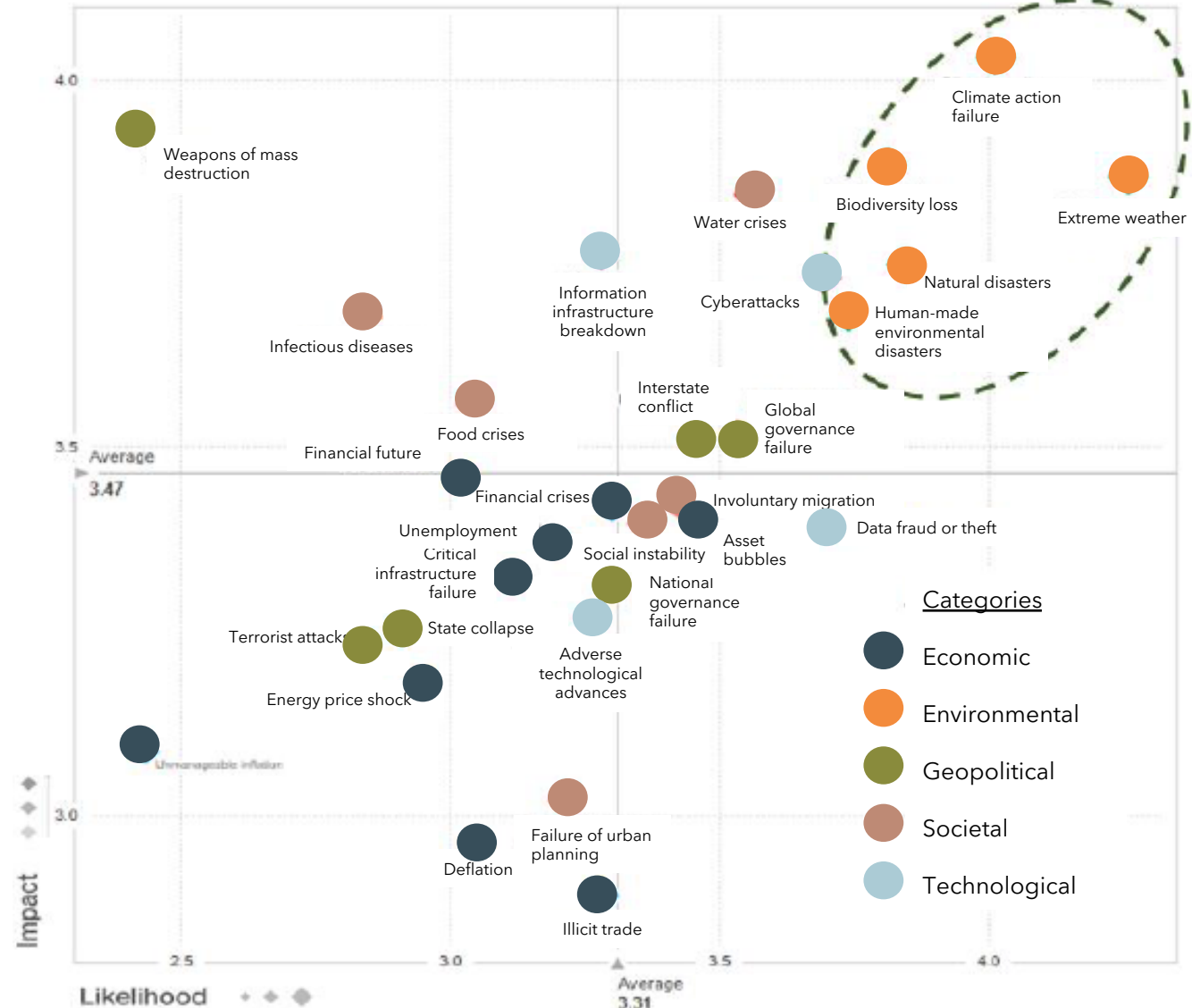
²Morningstar. The True Faces of Sustainable Investing -Busting Industry Myths Around ESG

³2018 Morgan Stanley Survey

Corporate Attention: WEF's 2019-2020 Global Risks Perception

What is the impact and likelihood of global risks?

Source: World Economic Forum's 2020 Global Risks Report

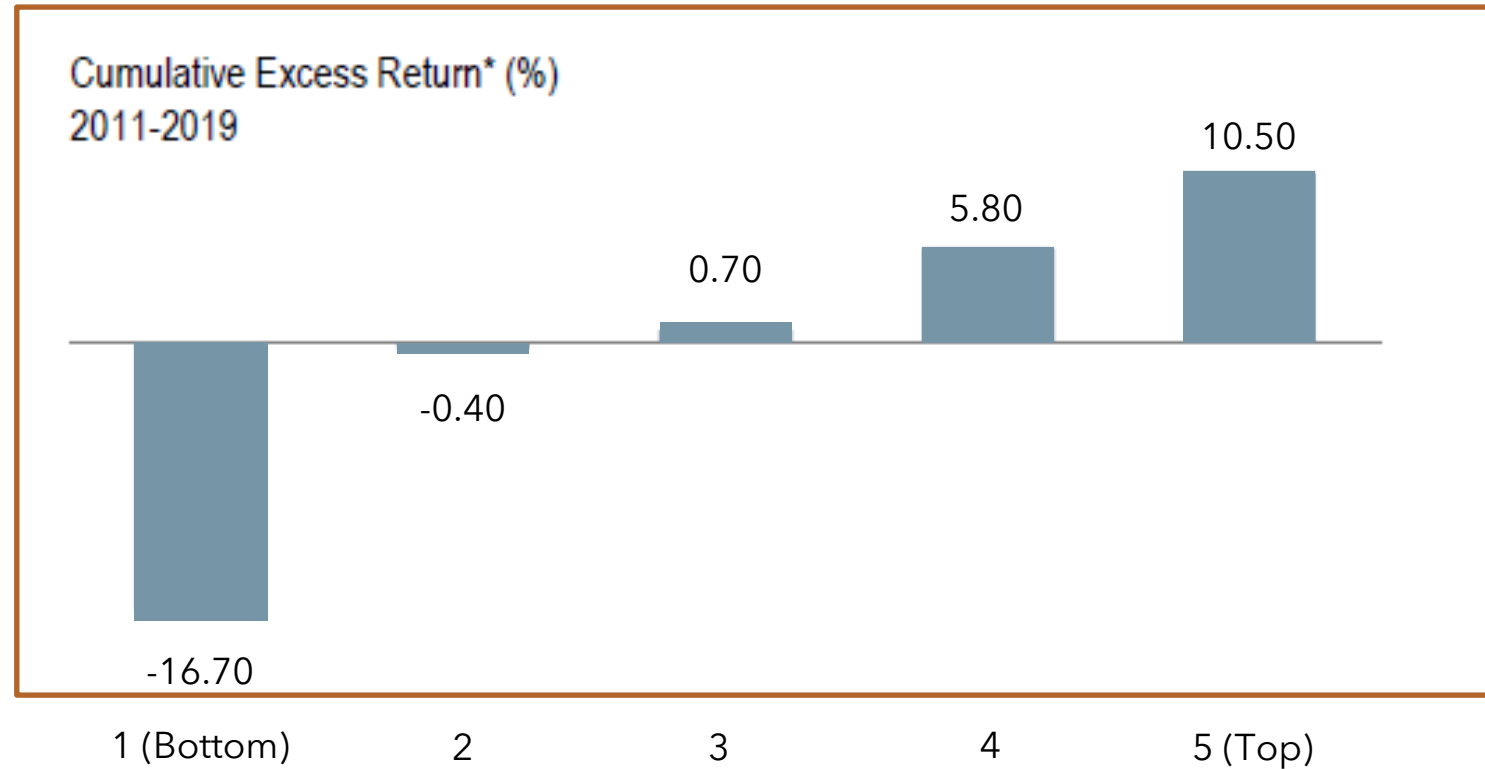


Performance & Risk

Equity returns may be linked to employee satisfaction

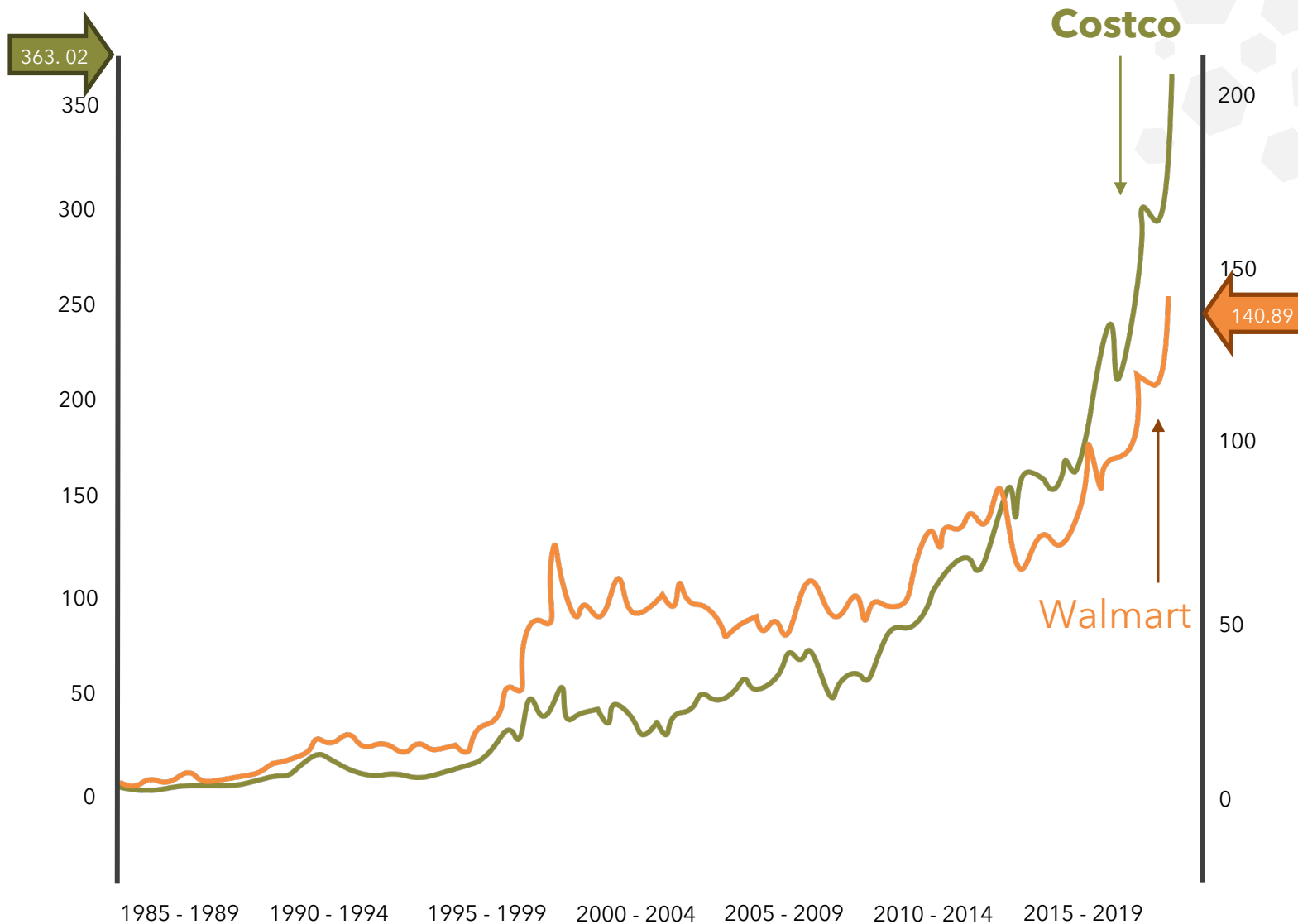


Company Quintile Based on QIS Analysis of Employee Satisfaction



Sources: GSAM, Thinknum Alternative Data. Based on data for US large cap companies. *Relative to the average return across quintiles. Stocks are equally weighted within quintiles.

Example: Costco vs. Walmart Performance Metrics



Source: Bloomberg

Any suggestion of cause and effect or of the predictability of economic or investment cycles is unintentional. Past performance is never a guarantee of future performance. Baker Avenue Asset Management LP may currently own or have previously owned a specific stock or company referenced, and a list of our past holdings can be found at the [SEC website](#). [Click to view full disclosures.](#)

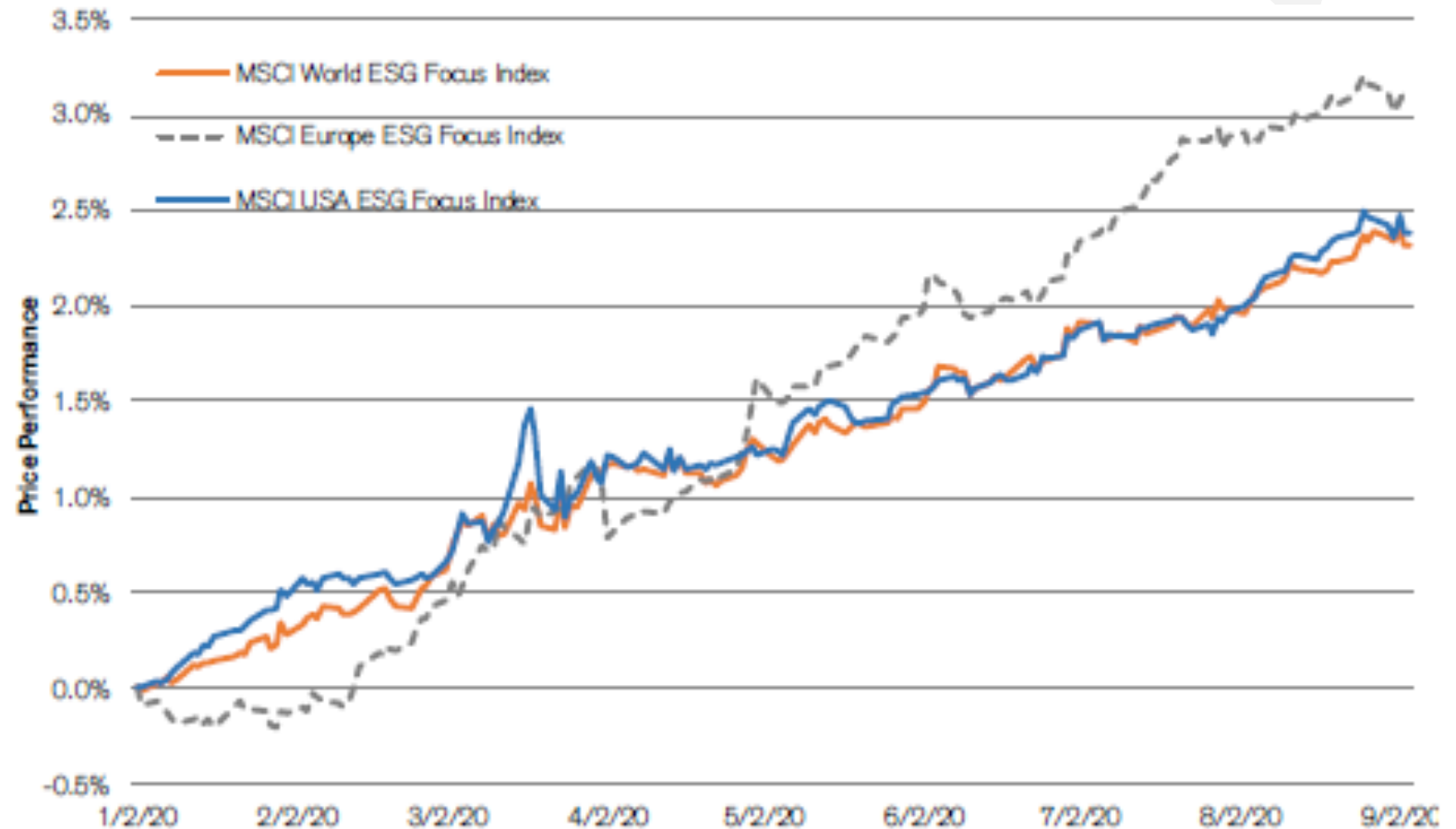
Corporate profile leads to increased valuation:

- Brand value
- Intellectual capital
- Human capital
- Customer relation



Companies with Superior ESG Credentials are Outperforming

MSCI ESG Indexes Performance Relative to Benchmarks as of 9/2/2020



Relative benchmarks are MSCI World, MSCI Europe and MSCI USA

Q & A

Tune in on Oct 28th...
Our final Series - III

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Elections Outcome: Potential Changes to Impact Investing

Thank You