

## **Mirova Global Sustainable Equity Fund Surpasses \$1 Billion in Assets Under Management**

**BOSTON, June 24, 2021** – Natixis Investment Managers (Natixis) and Mirova today announced that the Mirova Global Sustainable Equity Fund (ESGYX) has surpassed \$1 billion in assets under management. The fund is managed by Mirova US LLC (“Mirova US”), an affiliate of Natixis Investment Managers. Mirova is a certified B Corporation dedicated to sustainable investment, and one of only 20 asset managers selected by the Principles for Responsible Investment (PRI) organization to the PRI Leaders Group 2020.<sup>1</sup>

Mirova Global Sustainable Equity Fund was launched on March 31, 2016 and recently celebrated its five-year anniversary. It is a high-active share, all-cap global equity portfolio that seeks long-term capital appreciation by maximizing exposure to companies with a positive impact on the United Nations’ Sustainable Development Goals, as well as those with strong performance on material environmental, social and governance (ESG) indicators.<sup>2</sup> The fund provides diversified exposure to global equities and can improve investors’ portfolio sustainability and carbon footprint. Mirova is a signatory of the Net Zero Asset Management initiative and, like all of Mirova’s equity portfolios, the strategy seeks to be aligned with a <2°C global warming scenario, in line with the Paris Agreement.

“We are thrilled to reach this exciting threshold of \$1 billion assets under management. This milestone announces to the world what we already know – ESG investing is the way of the future. It makes sense from a social and environmental impact standpoint and as a sound financial investment. At Mirova, we believe that if you invest in positive change and do it well, returns will follow,” said Jens Peers, CFA, CEO and CIO at Mirova US.

“The growth of the Mirova Global Sustainable Equity Fund in its first five years is a testament to investors’ increasing appreciation of the role ESG strategies can play in portfolios,” said David Giunta, CEO for the US at Natixis Investment Managers. “We congratulate Mirova on this achievement of \$1 billion assets under management as yet another impressive milestone in their long history as an ESG investing specialist.”

The Mirova Global Sustainable Equity Fund benefits from Mirova’s deeply rooted experience in global sustainable investing and leadership in ESG. The portfolio management team conducts detailed fundamental research to select companies with competitive advantages that seek to deliver value over the long term and have high barriers to entry. They draw on a team of multi-disciplinary specialists and a Responsible Investment Research Team with analysts solely dedicated to thematic ESG research. The fund is co-managed by Hua Cheng, PhD, CFA®, Amber Fairbanks, CFA® and Jens Peers, CFA®. The fund seeks to maintain a relatively concentrated portfolio of approximately 50 global stocks and is managed by Mirova US.

<sup>1</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>2</sup> 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.

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To provide flexibility and choice for investors, the strategy is also available to eligible financial advisors and their clients through retail separately managed accounts (SMA).

Mirova also manages other equity mutual funds available to US investors – the Mirova US Sustainable Equity Fund (MUSYX) and the Mirova International Sustainable Equity Fund (MRVYX) – which are also available to eligible financial advisors and their clients as SMAs. It also offers the Mirova US Climate Ambition Equity Strategy only as a Separately Managed Account (SMA) and an ESG fixed income mutual fund – the Mirova Global Green Bond Fund (MGGYX).

The principal risks of investing in the Mirova Global Sustainable Equity Fund include Equity Securities Risk, Foreign and Emerging Market Securities Risk, Small and Mid-Cap Stocks Risk, ESG Investing Risk, Currency Risk. For more information about the Mirova Global Sustainable Equity Fund and the risk factors involved, please find information [here](#).

*Mirova is operated in the US through Mirova US LLC.*

***Before investing, consider the fund's investment objectives, risks, charges, and expenses. Visit [im.natixis.com](http://im.natixis.com) or call 800-225-5478 for a prospectus or a summary prospectus containing this and other information. Read it carefully.***

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### **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 the end of Q1 2021, which includes \$5.8 billion managed by its US subsidiary, Mirova US LLC.

### **About Mirova U.S., LLC**

Mirova US LLC (Mirova US) is a U.S. - based investment advisor that is wholly owned by Mirova. Mirova is operated in the U.S. 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, and services 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 more than \$1.3 trillion assets under management<sup>2</sup> (€1,152.8 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 Entrepreneurs; AlphaSimplex Group; DNCA Investments;<sup>3</sup> Dorval Asset Management; Flexstone Partners; Gateway Investment Advisers; 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

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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, L.P., a limited purpose broker-dealer and the distributor of various U.S. 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.

<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 March 31, 2021 is \$1,354.8 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. Excluding H2O Asset Management.

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

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

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