

## **Morgan Stanley Exceeds 5-Year Impact Investing Asset Goal**

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Morgan Stanley is pleased to announce that its Investing with Impact Platform (IIP) has more than doubled its \$10 billion asset goal in sustainable and impact investing. Today, the IIP has more than \$25 billion in client assets under management across 120+ third party separately managed accounts, mutual funds, ETFs, alternatives and accounts with custom mandates dedicated to sustainable and impact investing.

Morgan Stanley launched the Investing with Impact Platform at the U.S. State Department's inaugural Global Impact Economy Forum in April 2012. It was the first platform led by a major financial institution solely dedicated to sustainable investing. In November 2013, with the launch of the Morgan Stanley Institute for Sustainable Investing, the IIP committed to a \$10 billion goal by November 2018.

"Morgan Stanley provides access to a range of investment opportunities whereby the Firm's clients can seek to generate both market rate financial returns alongside positive environmental and social impact, advancing broad sustainability solutions as well as mitigating climate change, supporting diversity and inclusion, promoting community economic development and more," said Audrey Choi, Chief Sustainability Officer and Chief Marketing Officer, Morgan Stanley.

The Investing with Impact Platform is flexible enough to fit the varied needs of individual investors, families, religious organizations, corporations, universities, pensions, foundations, non-profits and donor-advised funds. Morgan Stanley provides 10 firm-discretionary and firm-guided portfolios, two impact pools in its donor advised fund as well as custom diversified portfolios all designed with the same rigorous investment discipline of the Firm's traditional portfolios. In terms of growth and adoption, 74% of Morgan Stanley Wealth Management Financial Advisors use at least one strategy on the IIP and 32% use five or more.

The past 12 months have been instrumental in driving adoption of sustainable investing across the Firm's Financial Advisor force as well as building solutions for highly-motivated client segments such as millennials, women and institutions. Two noteworthy programs launched in the past six months are the Mission Align 360<sup>o</sup> Toolkit and the Investing with Impact Director Designation.

The Investing with Impact Director Designation was developed to recognize Financial Advisors who are peer leaders in delivering holistic portfolio management for clients incorporating sustainable investing.

Mission Align 360<sup>o</sup> Toolkit provides an eight-step implementation roadmap for organizations that, for many years, have pursued mission-alignment in their philanthropic grant making but have not yet taken action in their market-rate investment portfolios. Morgan Stanley also offers toolkits on specific sustainable investing themes such as Catholic Values, Climate Change, Gender Diversity and more.

Morgan Stanley's IIP leverages the sustainability efforts and core competencies across all key Morgan Stanley businesses. To learn more about the Investing with Impact Platform visit [morganstanley.com/impactinvesting](http://morganstanley.com/impactinvesting) and the Institute for Sustainable Investing visit [www.morganstanley.com/sustainableinvesting](http://www.morganstanley.com/sustainableinvesting).

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The returns on a portfolio consisting primarily of sustainable or impact aware investments may be lower or higher than a portfolio that is more diversified or where decisions are based solely on investment considerations. Because sustainability and impact aware criteria exclude some investments, investors may not be able to take advantage of the same opportunities or market trends as investors that do not use such criteria.

Past performance is not a guarantee of future results. Diversification and asset allocation do not ensure a profit or protect against a loss.

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Contact:

Morgan Stanley  
Christy Jockle, 914-225-6827

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