

**PURPOSE**

This cheat sheet highlights useful resources and references to support sustainable investing discussions.



This is a starting point, not exhaustive. Inclusion of any provider or tool does not constitute endorsement.

**1 UNDERSTANDING SUSTAINABLE INVESTING STRATEGIES**

Definitions for Responsible Investment Approaches
CFA Institute



rpc.cfainstitute.org/research/reports/2023/definitions-for-responsible-investment-approaches



Responsible Investment Identification Framework
CIFSC



cifsc.org/responsible-investment-identification-framework/



Active Ownership 2.0 Framework
PRI



unpri.org/investment-tools/stewardship/active-ownership-20

**2 FUND SELECTION TOOLS**

Investment Products (RI Marketplace)
RIA Canada



riacanada.ca/ri-marketplace/investment-options/



ESG Risk Rating for Funds Methodology
Morningstar Sustainalytics



morningstar.com/content/dam/marketing/shared/research/methodology/744156_Morningstar_Sustainability_Rating_for_Funds_Methodology.pdf



Low Carbon Designation™
Morningstar



morningstar.com/content/dam/marketing/shared/research/methodology/Morningstar-Low-Carbon-Designation-Methodology-Final.pdf

**3 FUND RESEARCH & DUE DILIGENCE**

- Morningstar Sustainalytics
- MSCI ESG Research
- ISS STOXX
- Clarity AI

**4 CLIENT VALUES ALIGNMENT TOOLS**

- As You Sow 
- YourStake 
- Etho Capital  