



Great Lakes Impact Equity

A Regional Sustainability Strategy

Investment Objective

The MCM Great Lakes Impact Equity Strategy seeks to provide capital appreciation by investing in a concentrated portfolio of high quality, mid-to-large cap companies that have a positive impact on the sustainability of the Great Lakes St. Lawrence Region.

Investment Strategy

- **Positive Regional Impact:** Portfolio holdings have a definable positive impact on the Great Lakes Region as seen through various efforts including water use reduction, carbon reduction, energy efficiency, and environmental certification.
- **Concentrated ESG Approach:** Our strategy typically consists of 15-20 positions that represent the most attractive mid to large-cap companies that meet our investment criteria.
- **Experienced Investment Team:** Team approach with 100+ years of combined investment experience at MCM.



Risk Metrics and Portfolio Statistics¹

Beta	0.93
Dividend Yield	1.82
Wtd. Avg. Mkt. Cap (\$B)	211.9
Hist. 3 yr. Sales Growth	9.9
Hist. 3 yr. EPS Growth	15.3
ROE	19.3
Active Share	80.51
Tracking Error	4.44

Portfolio Data²

Overlap with our CGE strategy ³	30%
Headquartered in the Region	65%
Issue a Sustainability Report	85%
2018 CDP Climate Change Responses	95%
Median % of Sustainability Scores	80%

¹Risk Metrics and Portfolio Statistics are presented gross of advisory fees. Portfolio Data and Statistics are calculated by MCM and FactSet Research systems and are versus the MSCI USA ESG Select Index since inception.

²All Sourced by MCM. Updated Quarterly.

³The CGE Strategy is MCM's Concentrated Growth Equity Strategy. Further information is available upon request.

ABOUT US

Founded in 1978, Maryland Capital Management (MCM) is an independent investment management firm with over \$1 billion in assets under management serving high net worth and institutional investors.

SUSTAINABILITY INVESTING TEAM

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