

PRI 2021 Scorecard

Assessment of Anchor Capital Advisors Sustainable Investing Practices

PRI has recently overhauled its scoring system to help address the *grade inflation* that had occurred in the program over the years. As noted below, scores are now provided in a bell-curve driven “star” system rather than with letter grades. Notably, numerical scoring results for each advisor, versus the industry, provide a more helpful view of an asset manager’s relative strength versus peers.

Anchor is proud to have filed its first disclosure in 2021. Broadly, we feel that the scores reflect our efforts to incorporate sustainable investing principles across our business. As a firm we hope to continue to improve upon our sustainable investing efforts, while also noting that Anchor has a broad mix of clients, some of whom do not wish to pursue a sustainable investing objective at this time.

Module Name	Anchor Capital 2021 Score	Anchor Capital Percentile Score	Industry Average
Investment Stewardship Policy		82	60
Direct - Listed Equity Active fundamental - incorporation		72	71
Direct - Listed Equity Active fundamental - voting		70	54
Direct - Fixed income - SSA		<10	50
Direct - Fixed income - Corporate		<10	62

Full Reports in the following links: [Assessment Report](#) [Transparency Report](#)

Source: UNPRI. Signatories report on their responsible investment activities by responding to asset-specific modules in the Reporting Framework. Each module houses a variety of indicators that address specific topics of responsible investment. Signatories’ answers are then assessed and results are compiled into an Assessment Report. Please see the end of this presentation for important disclosures.

The views expressed are those of Anchor Capital Advisors, LLC (“Anchor”) as of the date written and are subject to change at any time. Anchor does not undertake any obligation to update the information contained herein as of any future date, nor does it have liability for decisions based on this information. Certain information (including any forward-looking statements and economic and market information) has been obtained from sources we deem reliable, but is not guaranteed by Anchor, nor is it a complete summary of available data. This publication has been prepared by Anchor Capital Advisors, LLC (Anchor). The information is for educational purposes only and should not be considered investment advice or a recommendation of any particular strategy or investment product. These opinions are not intended to be a forecast of future events or a guarantee of future results. No part of this document may be reproduced in any form, or referred to in any other publication, without express written permission of Anchor. Past performance is not guarantee of future results. Inherent in any investment is the possibility of loss. The benchmark returns include in reinvestment of income. Time-weighted portfolio returns are calculated for each monthly period in the prior quarter. A complete list of each security that contributed to performance is available upon request.

Please feel free to contact us with questions regarding our 2021 PRI Assessment.