



# HOW TO CUSTOMIZE IMPACT PORTFOLIOS

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## IMPACT INVESTING SINCE 1999

CCM manages \$2.4 billion in impact/ESG investments including Community Reinvestment Act (CRA) qualified investments. Our mission is to deliver superior risk-adjusted returns through investment strategies that contribute to positive environmental and social outcomes.

We believe a fully integrated portfolio – one that includes environmental, social and governance (ESG) factors – can deliver strong financial performance while simultaneously having positive long-term economic and sustainable impact. CCM's strategies utilize an innovative bottom-up approach to fixed income and equity investing combining measurable



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CAPITAL MANAGEMENT**  
Impact Investing Since 1999

social, economic, and environmental positive impacts with rigorous  
nt focus on risk management, and transparent  
rmation, please see CCM's Firm Overview.

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## Strategies



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We provide impact investing solutions coupled with hands-on client service to a broad range of investors through fixed income and equity strategies

## Customization



We offer institutional clients the opportunity to customize their bond portfolio by geographies or impact themes



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We report to clients on the multiple positive impact outcomes of their investments

# INVESTMENT TRANSPARENCY AND IMPACT REPORTING



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## How to customize impact investment portfolios: 2-minute video from CCM



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## THE WOMEN OF CCM

Community Capital Management, Inc. (CCM) was founded in 1998 and prides itself on its diversity and inclusion efforts. The firm has a long-standing tradition of focusing on gender pay equity, work/life balance, and maternity/paternity benefits. With the asset management industry reporting one of the lowest levels of representation among women, we are proud to report as of this writing that 46 percent of CCM's team are women and 21 percent of the firm is owned by women.

As the President and Chief Operating Officer, I am honored to share in this report the backgrounds and experience of the women of CCM. Their broad and impressive skill sets combined with their passion and commitment have shaped our investment strategies, improved our marketing and communications efforts, and inspired our business to thrive in unprecedented ways.

Alyssa Greenspan, CFA  
President and Chief Operating Officer

**46%**  
of team members are women

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**57%**  
of senior management are women

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**29%**  
of the investment team is women, three of whom are in senior positions

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**25%**  
of the firm board are women

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**21%**  
of the firm is owned by women

According to Pensions and Investments special report on the gender gap in institutional investing, only 9.1 percent of the CEOs and 6 percent of the chief investment officers of the largest institutional U.S. money managers are women.<sup>1</sup>

According to research from Morningstar Inc., 7 percent of investment managers in the \$15 trillion mutual fund industry in 2015 were female. This is down from 10 percent in 2009.<sup>2</sup>

According to a survey of asset managers from BackBay Communications and Osney Media, 78 percent of organizations say their firm has a "good" or "very good" approach when it comes to promoting both gender equality and racial diversity. However, just 6 percent say the overall asset-managing industry is "very good" on this front, and 35 percent describe the industry's approach to equality and diversity as "poor" or "very poor."<sup>3</sup>

<sup>1</sup> <https://www.pionline.com/article/20180430/PI01NT/180439998/its-time-for-real-diversity-in-asset-management>  
<sup>2</sup> [https://www.huffpost.com/entry/more-women-in-asset-management-would-be-a-game-changer-uk\\_598279e4b00833f14c287e](https://www.huffpost.com/entry/more-women-in-asset-management-would-be-a-game-changer-uk_598279e4b00833f14c287e)  
<sup>3</sup> <http://www.backbaycommunications.com/news/in-the-news/men-make-up-90-of-portfolio-managers-but-not-because-theyre-good-at-their-jobs/>

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## The Women of CCM



# COMMUNITY CAPITAL MANAGEMENT

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46% of team members are women

57% of senior management are women



# COMMUNITY CAPITAL MANAGEMENT

Impact Investing Since 1999

Alyssa Greenspan, CFA  
President and Chief Operating Officer

21% of the firm is owned by women

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*A full list of regulatory disclosures for Community Capital Management, Inc. are available by visiting: <https://www.ccminvests.com/regulatory-disclosures/>.*