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Aperio Group Announces Catholic Values Strategy: Exclusions & Scoring

*First Catholic Values Strategy to Offer Benchmark Returns While Reflecting
USCCB Guidelines on “Do No Harm” and “Promote the Common Good”*

Sausalito, CA—[Aperio Group](#), a research-based investment management firm specializing in hypercustomized portfolios designed to meet the specific tax, risk, and values-based/ESG goals of advisors and their clients, has launched Catholic Values Strategy: Exclusions & Scoring.

The strategy emphasizes companies that score well on human rights, anti-discrimination, labor, community investment, and the environment as recommended by the US Conference of Catholic Bishops (USCCB). It avoids companies whose products and/or policies are not in keeping with the teachings of the Church.

The Catholic Values Strategy is designed to track a broad global, international, or domestic equity market benchmark, depending on the investor’s preference. Investors can further customize the strategy to reflect additional ESG/SRI values, focus on harvesting tax losses, and/or tilt the portfolio toward factors such as high quality, low volatility, or momentum.

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