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Aperio Group Announces Women’s Inclusion Strategy

Women’s Inclusion Strategy Offers Benchmark Returns in a Gender Lens Portfolio

Sausalito, CA—[Aperio Group](#), a research-based investment management firm specializing in hypercustomized portfolios designed to meet the specific tax, risk, and values-based goals of advisors and their clients, has partnered with a family office to launch the [Women’s Inclusion Strategy](#).

The family office’s mission is to deploy impact investment capital with a gender lens to address society’s market failure to fully value women and girls. To reflect that goal in the public equities portfolio, the Women’s Inclusion Strategy emphasizes companies that have more women on their boards and in senior management, and that offer equal opportunity to women and observe their human rights. The strategy excludes companies that don’t have at least one woman on the board and at least one female executive. It also avoids companies that derive more than 10% of their revenue from adult entertainment because those activities do not support a society that fully values women and girls.

The Women’s Inclusion Strategy is designed to track a broad global, international, or domestic equity market benchmark, depending on a client’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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