

OUR OUTLOOK:

Our Values-Based Investment practice empowers advisors and consultants to help clients align their portfolios with ethical, moral, or religious principles — whether through Catholic Values, Jewish Values, or Christian Values strategies, or through customized approaches tailored to unique missions and beliefs. This compendium brings together Sage’s research and thought leadership in values-based, religious, and mission-driven investing, offering insights into the frameworks, priorities, and screening methodologies that guide each approach and support meaningful, responsible investment decisions.

CATHOLIC VALUES

[Catholic Values Investing Overview](#)

[Catholic Values Investing Brochure](#)

[Francis and Leo XIV: Faith, Finance, and a Greener Church](#)

[Pope Francis: An Environmental Stalwart, Requiescat in Pace](#)

[Values Based Investing Comparative Analysis with References](#)

[A Historical, Theological, and Practical Framework for Today’s Investors](#)

[Catholic Values Investing in Practice](#)

[Catholic Values Investing in a Digital Age](#)

[From Screening to Stewardship](#)

[Stewardship as a Fiduciary Responsibility](#)

JEWISH VALUES

[Jewish Values Investing Overview](#)

[Jewish Values Investing Brochure](#)

[Jewish Values-Based Investing: Creating a Framework for Success](#)

CHRISTIAN VALUES

[Christian Values Investing – Balancing Faith & Finance](#)

[The Trump Administration’s Impact on Sustainable and Religious Values-Based Investing](#)

[From Conviction to Construction: A Christian Investing Framework](#)

MISSION DRIVEN INVESTING

[Mission Driven Investing Overview](#)

[Video: Mission Driven Investing Overview](#)

[Investing For Endowments & Foundations Brochure](#)

[Investing with Purpose: Aligning Capital with Mission](#)

[Mission Driven Investing: Aligning Portfolio Strategy With Nonprofit Purpose and Sustainability](#)

