VALUES-BASED INVESTING COMPENDIUM

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.

The Rise of Faith-Based ETFs: An Expanding Marketplace for Values-Aligned Investors



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

Integrating Catholic Social Teaching and Mission-Driven Investing

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