

MEMBER PROFILE
WITH BOB SMITH
PRESIDENT & CHIEF INVESTMENT OFFICER



“The human resources that you’ve made available to us have been invaluable.”

WHY WE JOINED THE SASB ALLIANCE:

- » It was important for us to be in line with SASB and take advantage of their experience interpreting ratings agencies’ methodologies around ESG from a credit rating perspective.
- » We really needed someone to be the referee on the field—not to make the rules but to give guidance on how to interpret ESG data—and that’s what SASB has done. We want to support that.

HOW WE’VE LEVERAGED THE SASB ALLIANCE:

- » Our biggest job right now is education, and being part of the Alliance has helped us talk to current and future clients about financial materiality.
- » We have interviewed SASB staff and analysts and created podcasts to illustrate how ESG connects to credit analysis.
- » Access to SASB personnel and their knowledge has enabled us to better explain what SASB is and why it matters.

HOW WE APPROACH SUSTAINABILITY:

- » As risk managers, we must prioritize ESG data by what is most financially material, and SASB’s work has allowed us organize the massive amount of quantitative ESG data that exists.
- » SASB’s materiality map has enabled Sage to sort and sift through the wealth of ESG data, both for fixed income and equities.



SASB.ORG/ALLIANCE

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