

## Q2 2019



The Natural Progression to Better Investment Returns

### **50 Months of Superior Investing**

When Terra Alpha Investments was founded in late 2014, we grounded our investment philosophy on solid economic, scientific, and financial thinking. Our planet's supply of natural resources upon which human life depends is being depleted while demand for those resources continues to grow. Unchecked, these unsustainable forces can only lead to increased financial and societal costs.

Our fundamental thesis remains unchanged: companies that are leading efforts to efficiently manage their use and impact of our planet's air, freshwater, soil, forests, oceans, and raw materials will be more successful today and in the decades ahead. We have built our firm's investment process to identify leading companies across the globe by incorporating natural resources efficiency (we call it Environmental Productivity) into every aspect of our long-term fundamental analytical and stock valuation process. In the 50 months of running our investment strategy via Terra Alpha Fund LP (TAF) we have demonstrated that our use of Environmental Productivity combined with our Enduring Business Model fundamental assessment process does improve both financial and environmental outcomes.

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## Growth and Change are Essential for Continued Success

Since our fund first opened, our assets under management have increased 470% to the current \$47 million. Based on this initial success, we are pleased to announce a number of actions we have taken to assure our ability to serve the growing demand for sustainable investment management.

### Additions to our Advisory Board:



Jean Rogers, the founder of SASB, brings a systems-level perspective to our work to further refine our forward looking sustainable investment process.



Charlie Bolden, Astronaut and former Administrator of NASA, expands our team's thinking about our planet's natural boundaries.

### Addition to our Investment Team:



Julianna Brunini, BA in Planetary and Earth Sciences from Harvard College, joined the team on June 24th. She will cover the Industrial and Energy sectors.

### **New Office and New Look:**

As of July 23rd, all of our DC-based associates will be located in our new office at 2101 L Street NW, Suite 300. The new space also provides a great location for hosting meetings with partner organizations and investors. We look forward to welcoming you to our office to meet the team.



We are unveiling a new logo, website, and communications tools that better reflect and explain our commitment to financial returns grounded in nature.

### **More capacity to work with investors:**

Finances: In order to support more rapid growth, Terra Alpha Investments undertook a capital raise at the end of last year with existing investors in our strategy. The additional capital positions our firm to be able to reach more investors and increase our impact.

#### Business Development Team:

Tara Doyle joined our firm in December of 2018 as Director of Business Development.

Contact: [tara@terraalphainvestments.com](mailto:tara@terraalphainvestments.com)



Katie Bovard joined the firm last month as our Investor Relations Associate.

Contact: [mkb@terraalphainvestments.com](mailto:mkb@terraalphainvestments.com)



Access: In addition to our funds being included on the Fidelity IRA platform, they now also are included on the Pershing Advisor platform. We expect to be added to more platforms over time.

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## Insights and Research

### Advisor Blog:

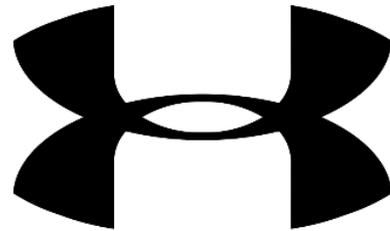
Advisor David Yeh has a wide range of professional experience in the renewable energy and private equity markets. We were delighted that he joined our Advisory Board in 2018. Read more about David's experiences and decision to join our advisory board [here](#).

### Sustainable Agriculture:



WRI recently released [a report](#) entitled *World Resources Report: Creating a Sustainable Food Future*, that "offers a five-course menu of solutions to ensure we can feed 10 billion people by 2050 without increasing emissions, fueling deforestation or exacerbating poverty".

### Environmental Productivity Insights:



**UNDER ARMOUR®**

Large public companies can take a leading role in building a sustainable economy, while also supporting their stakeholders' interests, by changing operational and production processes, harnessing their supply chain, and leveraging R&D in new product development. Yet not all companies choose this strategy. In fact, our research shows a wide opportunity gap between leaders and laggards even within the same industry. For example, in the athletic footwear and apparel industry Nike stands out as a leader in sustainable business practices, while Under Armour seems to have chosen a very different path.

[Read the full story here.](#)

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## Terra Alpha at Confluence Philanthropy's Climate Solutions Summit

In June, Tim Dunn and Jean Rogers participated in the Climate Solutions Summit.

As a panelist in the **Pre-Covery: Building Resilience for the Future** session, Tim shared Terra Alpha's approach to assessing how prepared a company is to operate in our changing world.

Jean made her first appearance as a Terra Alpha Advisor on the **Banking with Values** panel, during which she interviewed Kat Taylor, CEO & Founder of Beneficial State Bank.



### About Terra Alpha

Terra Alpha Investments is a public equity manager founded in 2014 by highly experienced investors who share the conviction that our rapidly evolving world requires a change in investing thinking. Our rigorous and proprietary Environmental Productivity (EP) analysis values our planet's natural resources and sits at the center of our successful investment process. Our innovative process of quantitative and qualitative analysis helps us identify companies with the optimal combination of enduring business models and superior EP. We believe this process is the primary driver of our ability to deliver superior long-term investment returns for our investors.

### Contact

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