

Investing in Your Faith: Actions for Jewish Values Investors

Many faith-based organizations are embracing innovative ways to engage members. Following, we include a few ways investors can align their portfolios with Jewish values:

1. Tilt investments toward timeless Jewish environmental and social values.

Aligning investments with resolutions passed by organizations representing the different denominations allows investors to positively tilt their stock portfolios toward environmental, social, and governance (ESG) thematic issues like human rights, climate change, gender and ethnic diversity, and corporate governance. In the private markets, investors are targeting specific impact sectors like food & agriculture, education, and health & wellness.

2. Participate in shareholder engagement initiatives.

Shareholder engagement can be a powerful way to change corporate behavior, and a growing number of investors are taking notice. Engagement can be broken into two components: (1) voting proxies on important questions at annual shareholder meetings and (2) engaging in direct dialogue with a company. For example, note the [shareholder engagement](#) work by JLens Investor Network. On the third anniversary of Bangladesh's Rana Plaza collapse, one of the deadliest garment-factory accidents in history, JLens collaborated with over 250 institutional investors from twelve countries to promote continued reforms in the global apparel sector and guarantee the safety and well-being of workers.

3. Invest in Israeli innovation and entrepreneurship.

Since the publication of *Start-up Nation: The Story of Israel's Economic Miracle* in 2009, the pace of innovation there has only increased. Suitable investors may look to private equity and venture capital markets to gain exposure to the region by providing capital to Israeli investors or raising assets directly for Israeli companies.

4. Demonstrate support for Israel public equity markets.

The [BlueStar Index](#) data allows investors to boost the weight of companies in their portfolio with exposure to Israel. This approach is implemented in public market portfolios while managing the risk and return dynamics relative to traditional or custom benchmarks.

Glenmede's Top 5 is intended to be an unconstrained review of matters of possible interest to Glenmede Trust Company clients and friends and is not intended as personalized investment, estate planning, tax or legal advice. Investment and wealth advice depends on many individual facts and circumstances we cannot account for here. For legal and tax advice, consult your lawyer or accountant. Opinions or projections herein are based on information available at the time of publication and may change thereafter. Information gathered from other sources is assumed to be reliable, but accuracy is not guaranteed. Outcomes (including performance) may differ materially from expectations herein due to various risks and uncertainties. Any reference to risk management or risk control does not imply that risk can be eliminated. All investments have risk. Please contact your Glenmede representative to discuss the applicability of any matter discussed herein.

GLENMEDE top five

5. Attend industry events that discuss the intersection of Jewish values and investing.

We attend several events per year and two jumped out at us. The [Jewish Funders Network](#) International Conference, which was in Tel Aviv this year, and the Jewish Impact Investing Summit organized by [JLens Investor Network](#) in New York City. Those are great places to learn about this burgeoning field and meet likeminded investors. Or if you don't have time to attend, just call us. We can fill you in.

Glenmede's Top 5 is intended to be an unconstrained review of matters of possible interest to Glenmede Trust Company clients and friends and is not intended as personalized investment, estate planning, tax or legal advice. Investment and wealth advice depends on many individual facts and circumstances we cannot account for here. For legal and tax advice, consult your lawyer or accountant. Opinions or projections herein are based on information available at the time of publication and may change thereafter. Information gathered from other sources is assumed to be reliable, but accuracy is not guaranteed. Outcomes (including performance) may differ materially from expectations herein due to various risks and uncertainties. Any reference to risk management or risk control does not imply that risk can be eliminated. All investments have risk. Please contact your Glenmede representative to discuss the applicability of any matter discussed herein.