

Sustainable Fixed Income Solutions Case Studies from Institutional Investors

State Street · Rupert Cadbury · 2026-09-04 · English original

State Street Investment Management has extensive experience helping institutional investors integrate sustainability requirements into their investments. New technology and big data are creating tremendous opportunities for investors while also disrupting conventional approaches to portfolio management. We understand that our clients view their sustainable investing objectives, and in turn their portfolios, holistically and we look to enable the integration of sustainable investing criteria, where desired, across fixed income, equity and beyond.

Here we share insights and examples of sustainable fixed income solutions developed and managed for institutional clients in recent years.

The data sources, metrics and thresholds used in the examples are driven by the unique needs of the investor.

We look to provide clients with investment solutions and customization capabilities that meet both their sustainable investing needs today and their future ambitions.

For institutional / professional investors use only.

State Street Global Advisors Worldwide Entities.

The case studies presented above are for illustrative purposes only, actual results could differ substantially based on the investors individual circumstances and investment goals. The above targets are estimates based on certain assumptions and analysis made by State Street Global Advisors. There is no guarantee that the estimates will be achieved.

Investing involves risk including the risk of loss of principal.

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All the index performance results referred to are provided exclusively for comparison purposes only. It should not be assumed that they represent the performance of any particular investment.

The returns on a portfolio of securities which exclude companies that do not meet the portfolio's sustainable strategy criteria may trail the returns on a portfolio of securities which include such companies. A portfolio's sustainable strategy criteria may result in the portfolio investing in industry sectors or securities which underperform the market as a whole.

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Investments in emerging or developing markets may be more volatile and less liquid than investing in developed markets and may involve exposure to economic structures that are generally less diverse and mature and to political systems which have less stability than those of more developed countries.

Bonds generally present less short-term risk and volatility than stocks, but contain interest rate risk (as interest rates raise, bond prices usually fall); issuer default risk; issuer credit risk; liquidity risk; and inflation risk. These effects are usually pronounced for longer-term securities. Any fixed income security sold or redeemed prior to maturity may be subject to a substantial gain or loss.

Equity securities may fluctuate in value and can decline significantly in response to the activities of individual companies and general market and economic conditions.

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This document provides summary information regarding the Strategy. This document should be read in conjunction with the Strategy's Disclosure Document, which is available from State Street Investment Management. The Strategy Disclosure Document contains important information about the Strategy, including a description of a number of risks.

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