

Zeldis' ESG* Research

- Five Key Insights -

- (*) Environmental, Social & Corporate Governance



Terminology Is A Barrier

Investors and **advisors** alike struggle with ESG-related terminology; future ESG positioning should clarify definitions for both audiences, leveraging clearly understandable language to increase future uptake of ESG investments.

Companies Should Lead with the “E” or the “S”

Where understanding of ESG exists, it is around environmental and social issues. Corporate governance seems to matter less to both **investors** and **advisors**.



ESG May Hold Some Benefits

Both **investors** and **advisors** align on the key benefits of ESG investing – specifically, making investors feel good about themselves/peace of mind, and making a positive impact on the world.

Investors Don't View Advisors As Primary Resources for ESG Information

While **investors** consider advisors a top investing resource in general, this is not the case for ESG investments – and **advisors** feel underutilized, as well.

Neither Investors Nor Advisors Think ESG Investments Perform Well

If **investors** could be convinced ESG funds performed even at par with traditional investments, they might consider these funds in the future.

Learn more at:
ESGInvestingResearch.com