sonen capital

Sonen Capital is a trusted partner of choice for asset owners seeking unbiased and tailored investment solutions that address the world's most pressing challenges.

We believe that investment capital is necessary to effect large scale impact. For more than a decade, we have designed and implemented impact investment strategies tailored to the diverse objectives of foundations, endowments, institutions and families. We are committed to building and managing bespoke investment portfolios that reflect each client's financial, impact and philanthropic goals.

Sonen at a Glance

13
Years of experience as a dedicated impact investment advisor

20
Average years of impact investment experience of senior investment team[1]

149.6
B Corp Score*

$850 million
Approximate impact assets under management and advisement[2]

160+
Impact investments made globally across asset classes and impact themes

135
Impact performance indicators across ~two dozen impact themes tracked

What sets Sonen apart

» Deep impact investment experience – Founded in 2011, Sonen Capital has been a dedicated impact investment advisor since inception. Our commitment to authentic impact measurement and reporting helps ensure transparency and accountability in every investment decision. Recognized for our innovative thought leadership, we drive industry progress forward.

» An independent investment firm – As an independent, employee-owned firm, we prioritize our clients' best interests, offering unbiased advice tailored to their unique needs.

» Strong client partnerships – We foster long-lasting client relationships, tailoring portfolios to reflect individual investment, impact, and philanthropic goals. Our size allows us to be agile and adapt to evolving industry trends and meet clients at every stage of their impact investment journey.

» Integrated global impact investment platform – The Sonen team is experienced with decades of extensive industry engagement and deep personal relationships with impact managers globally. We have developed a fully-integrated investment process that examines financial and impact metrics, including race and gender, of each investment.

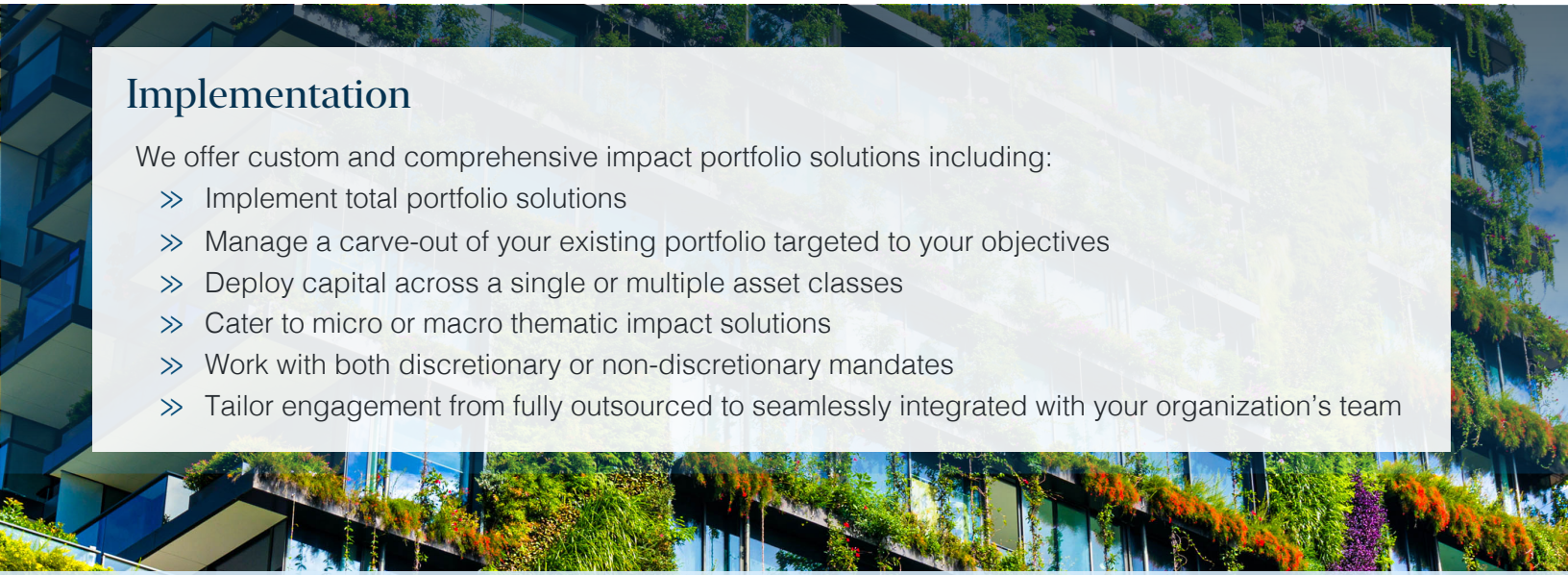
Information as of 12/31/2023, see Appendix for sources and disclosures.

*The B Corp assessment is an evaluation tool used to measure a company's social and environmental performance, transparency, and legal accountability, and assesses a company's impact across various aspects of its operations, including governance, workers, community, environment, and customers. B Corp score can range from 0 – 200. To be a certified B Corp, a company must score at least 80 points, the median score for ordinary businesses who complete the assessment is 50.9. Sonen Capital was last rated in June 2022 and the next rating is in 2025.

Impact Themes

Sonen's Impact Taxonomy:
We track 15 themes and 65 sub-themes and report on 135 impact performance indicators

- Climate
- Creative Economy
- Economic Development
- Education
- Enegry
- Food & Agriculture
- Health
- Natural Resources
- Real Estate
- Social Justice
- Transportation
- Waste & Pollution
- Water
- Other
- Multi-Theme



Implementation

We offer custom and comprehensive impact portfolio solutions including:

- Implement total portfolio solutions
- Manage a carve-out of your existing portfolio targeted to your objectives
- Deploy capital across a single or multiple asset classes
- Cater to micro or macro thematic impact solutions
- Work with both discretionary or non-discretionary mandates
- Tailor engagement from fully outsourced to seamlessly integrated with your organization's team

Let's Connect

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Disclosure & Sources

1. The information provided about the aggregated experience of the Sonen Capital team is based on work experience each person did with other firms and Sonen Capital.
2. As of 12/31/2023, Sonen manages approximately $850 million in discretionary and non-discretionary assets.

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