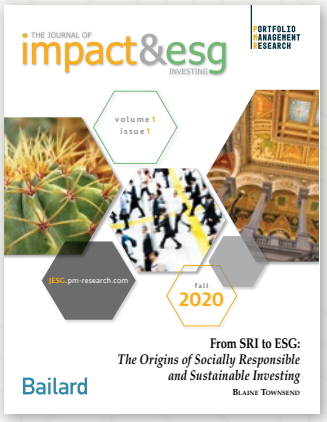
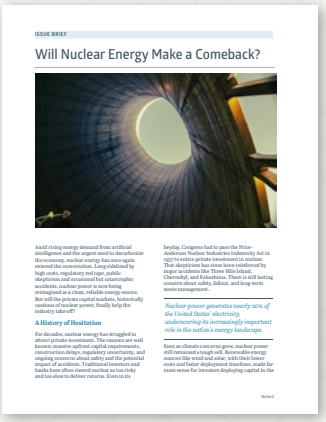
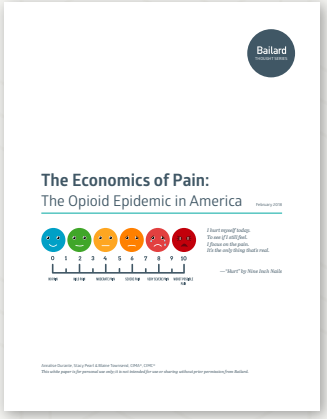
Bailard

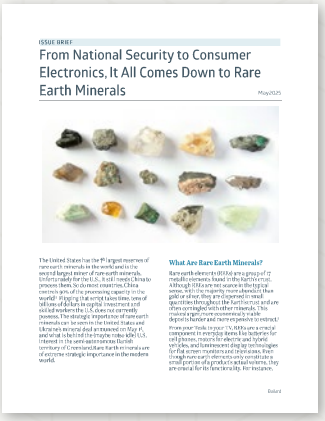
Issue Research & Outreach Library

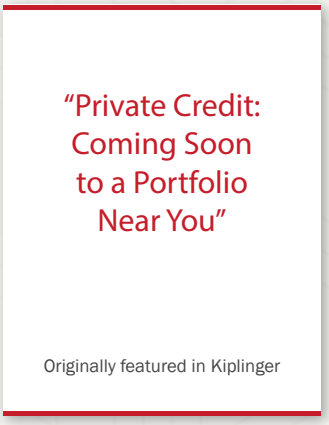
A living catalogue of Bailard's Sustainable, Responsible & Impact Investing (SRII) publications
Q3 2026

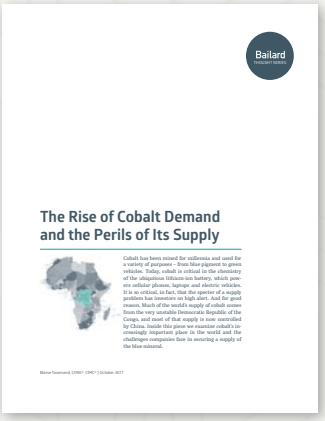












A History of Forward Thinking

This library captures nearly a decade of Bailard's SRII issue research and outreach (IRO), curated across four enduring themes in sustainable and responsible investing.

Climate & Natural Resources

Understanding the financial impact of climate change and resource scarcity.

People & Communities

Exploring how business choices affect workers and their communities.

Responsible Governance

Evaluating accountability, fiduciary duty, and the role of shareholders.

Innovation & Finance

Examining how new technologies and financial tools are reshaping markets.

- Corporate political giving disclosure: Why transparency matters for investors (Issue Brief, September 2026)
- Prediction markets explained: Financial innovation or gambling risk for sustainable investors? (Issue Brief, July 2026)
- Sustainable, Responsible, and Impact Investing in the Age of Artificial Intelligence: Why AI is a defining challenge for modern portfolios (June 2026)
- The Sleeping Giant: Can Geothermal Power the AI Revolution? (Issue Brief, Feb 2026)
- 2025 Proxy Season Review: Fewer Proposals Amidst Greater Scrutiny (Issue Brief, Feb 2026)
- Unpacking Incarcerated Labor (Issue Brief, Dec 2025)
- Will Nuclear Energy Make a Comeback? (Nov 2025)
- Rethinking globalization: The unintended environmental and social benefits of reshoring the U.S. supply chain (Sept 2025)
- For-profit healthcare: Balancing profit and patient care (Issue Brief, Sept 2025)
- Defense Tech: It's hard to tell the swords from the plowshares (Aug 2025)
- From national security to consumer electronics, it all comes down to rare earth minerals (Issue Brief, May 2025)
- Can AI end animal testing? The FDA thinks so (Issue Brief, May 2025)
- Private credit: Coming soon to a portfolio near you (*Kiplinger*, Feb 2025)
- While nuclear energy attracts attention, investors should not lose sight on the promise of renewables (Oct 2024)

> "In just 2020 and 2021 alone, the world added 464 gigawatts of power-generating capacity of wind and solar, more than the capacity of all the nuclear plants ever built."

- Bankrolling carbon: How to measure financed emissions (Issue Brief, Jun 2024)
- Do you feel more negative these days? Blame the algorithm (*Kiplinger*, May 2024)

> "The algorithm amplified the echo, serving up ads (informative and disinformative) and content in service to other actors."

- The weight is over: But is it a loss for Type 2 diabetes patients? (Issue Brief, Apr 2024)
- The rise of B Corps and Benefit Corporations (Jan 2024)
- Impact of investing and the power of intention (Oct 2023)
- What does NIL mean for advisors? (*Wealth Management*, Oct 2023)
- ISSB's inaugural Global Sustainability Disclosure Standards (Issue Brief, Jul 2023)
- Tax transparency (Issue Brief, Jun 2023)
- Your thinking about ESG is all wrong. Here's what it's really about. (*Fast Company*, Mar 2023)

> "To enhance the odds that investment will pay off, there is one sure path: spend it on women and girls."

- SRII Social Impact Report (Feb 2023)
- COP 15: The historic United Nations Biodiversity Conference (Issue Brief, Dec 2022)
- Investors have guns in their sights (*ESG Clarity*,

Jul 2022)

> "'It may take another act of horror to push really effective gun curbs through Congress', wrote Time Magazine in response to the Gun Control Act of 1968."

- War and peace: Where does oil fit in? (*ESG Clarity*, Apr 2022)

> "Cutting off Russian oil will hurt Europe economically as west sacrifices economics to support a young democracy in Ukraine. But don't blame proponents of renewables for that dynamic."

- Bailard becomes CDP investor signatory (Mar 2022)
- COP26 (Issue Brief, Nov 2021)
- Can green be the color of cryptocurrency too? (Issue Brief, Jul 2021)
- Does company size bias in ESG scores impact small cap investors? (*Journal of Impact & ESG Investing*, Jul 2021)
- Predatory lending: An important but often overlooked ESG investment consideration (Issue Brief, Jun 2021)
- The real New Deal: Spend stimulus money on women and girls (*Real Leaders*, May 2021)
- Human trafficking (Issue Brief, Mar 2021)
- While politics may shift, ESG is here to stay (*Worth Magazine*, Nov 2020)
- The continuing evolution of SRI and ESG investment processes (Issue Brief, Sept 2020)
- From SRI to ESG: The origins of socially responsible and sustainable investing (*Journal of Impact & ESG Investing*, Sept 2020)
- Inequality as an investment risk (*InvestmentNews*, Aug 2020)
- The COVID-19 reset: Why right now is the time to consider ESG (*Worth Magazine*, Jun 2020)
- Corporate responsibility during the COVID-19 crisis (*Wealth Management*, Apr 2020)
- Responsibility in business does matter (Oct 2019)
- Philip Morris Altria merger? Fool me twice, shame on me (Sept 2019)

> "If vaping and e-cigarettes become the domain of the tobacco industry, the industry's track record suggests that a heavy dose of regulation will need to follow or this catastrophic economic and health pattern will be repeated."

- Pushing for progress in standardized ESG reporting (Jul 2019)
- Women in the C-suite: Progress remains slow (Issue Brief, Jun 2019)
- The case for standardized, audited ESG reporting (*Accounting Today*, May 2019)
- Standardized environmental investing reporting: The long road to standardized environmental reporting (Apr 2019)
- SDG (Issue Brief, Nov 2018)
- Has big tech broken "The Social Contract?" (*Real Leaders*, Sept 2018)

> "Today, it is large tech companies that are playing an outsized role in everyday life and the intrusion is expanding at lightning speed. In fact, there is far more information on the average American imbedded in one private server farm today than any government has ever known about its citizenry in history."

- Carbon tax (Issue Brief, Aug 2018)
- Heed the ancient mariner: Stop dumping plastic in the ocean (Issue Brief, Jul 2018)
- Animal welfare investing (Issue Brief, Apr 2018)
- Gender lens investing (Issue Brief, Apr 2018)
- Gun control investing (Issue Brief, Mar 2018)
- The economics of pain: The opioid epidemic in America (Feb 2018)

> "The pharmaceutical industry's great technical prowess, backed by corporate lobbyists and naked capitalism, helped create an American modality to relieve pain: inexpensive, highly addictive pain pills."

- Solar tariffs (Issue Brief, Feb 2018)
- Net neutrality (Issue Brief, Jan 2018)
- Sustainability Accounting Standards Board (Issue Brief, Nov 2017)
- Green bonds investing Issue Brief (Oct 2017)

> "Investors should be wary of 'greenwashing,' where an issuer may overstate the environmental sustainability of respective projects."

- The rise of cobalt demand and the perils of its supply (Oct 2017)
- Catholic values investing (Issue Brief, Sept 2017)

Sustainable, Responsible & Impact Investing at Bailard

Bailard's SRII team views thought leadership as a means to push innovative, thought-provoking, and sometimes even provocative ideas for the industry, world, and individuals in an endeavor to create change.

Blaine Townsend, CIMC®, CIMA®
EVP | Director of Sustainable, Responsible & Impact Investing
- Joined Bailard in 2016; 32 years' investment experience
- Previously Senior Portfolio Manager at Wells Fargo ESG asset management firm Nelson Capital Management
- Formerly Vice President, Portfolio Manager at Trillium Asset Management and led California office
- BA, History, University of California, Berkeley

Annalise Durante, CFP®
VP | Senior SRII Research Analyst | Investment Counselor
- Rejoined Bailard in 2023; 8 years' total tenure and 11 years' investment experience
- Previously Citi Private Bank
- BS, Finance, University of Miami; CERTIFIED FINANCIAL PLANNER®

Madison Hardy
Senior SRII Research Analyst
- Joined Bailard in 2025, after a 2020 internship
- Previously Consulting Analyst, Business Technology, Deloitte
- BS, Psychology, Columbia University

Resources & Acknowledgements

This library captures nearly a decade of Bailard's SRII issue research and outreach. It is a living catalogue that is updated regularly on our website at bailard.com/sustainable-responsible-impact-investing.

While the majority of these articles were authored by Bailard's SRII team, this volume also includes select pieces contributed by other Bailard colleagues, past and present, whose work we gratefully acknowledge:

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