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SUSTAINABILITY MATTERS

How Can Climate-Aware Funds Fit Into Your Portfolio?

Just as governments around the world have spent the past year racing to get the coronavirus pandemic under control, we should be racing to contend with a similarly harmful global event: the threat of climate change. To be sure, a growing number of entities are doing their part. Regulators are ratcheting up efforts to combat climate change, and the investment

How can individual investors play a part in this effort? To start, they can familiarize themselves with climate-aware funds and fit them into their portfolios where appropriate. The funds we consider "climate-aware" represent a broad range of approaches to meeting various investor needs and preferences, such as ... carbon solutions.

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Largest Climate-Aware Funds in the United States

Name	Climate Category	AUM (USD bln)	Q4 2020 Flows (USD bln)
iShares Global Clean Energy ETF	Clean Energy/Tech	4.67	1.98
Invesco Solar ETF	Clean Energy/Tech	3.62	0.91
Invesco WilderHill Clean Energy ETF	Clean Energy/Tech	2.17	0.74
First Trust NASDAQ® Cln Edge® GrnEngyETF	Clean Energy/Tech	1.99	0.98
Pax Global Environmental Mrkts Instl	Climate Solutions	1.62	0.22
ALPS Clean Energy ETF	Clean Energy/Tech	0.78	0.18
Calvert Green Bond I	Green Bond	0.76	0.14
iShares MSCI ACWI Low Carbon Target ETF	Low Carbon	0.62	0.07
TIAA-CREF Social Choice LwCrbn Eq Instl	Low Carbon	0.56	0.06
Invesco Cleantech™ ETF	Clean Energy/Tech	0.46	0.08

Source: Morningstar Direct. Morningstar Research. Data as of December 2020.

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