



Five ESG transition tips for pensions trustees



Transitioning a portfolio to address ESG risks and opportunities can appear daunting. Here are five insights that may help.

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By Mark Barnes, managing director, head of US research

Recent market turbulence has awakened memories of the painful side of stock volatility. It has also revived interest in defensive strategies that can provide long-term downside protection without sacrificing upside participation. But not all defensive strategies are created alike—they have distinct objectives and have produced very different return patterns over time. The December meltdown and subsequent snapback offer a live test case of this point.

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Although growth has outperformed value over the last several years, heightened volatility in the US equity market and a fourth quarter correction has left more than a few people wondering whether value is finally going to have its day in the sun.

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