SHELTON CAPITAL MANAGEMENT
GREEN FIXED INCOME ACCOUNTS

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GREEN FIXED INCOME INVESTING

WHY WE LIKE IT

▸ Low-risk impact plays
▸ Taxable or tax-exempt interest
▸ Positive SRI characteristics
▸ Maturing market => diversification
▸ Clear criteria and verification
▸ No yield give-up, so far

CHALLENGES

▸ Still need “do no harm” holdings
▸ “Greenwashing” risk
▸ Green bonds from “brown” companies?
CORE FIXED INCOME SOLUTIONS WITH AN ENVIRONMENTAL SUSTAINABILITY FOCUS

Shelton Municipal Bond Portfolio Strategy

- Municipal bonds
- Advancing sustainability in the public arena
- Tax-exempt interest

Shelton Fixed Income Portfolio Strategy

- Corporate, agency, government bonds
- Green projects
- Taxable interest

This presentation is for financial professionals only. Not to be used with the public.
There are management Fees and other charges associated with the Shelton Separately Managed Account programs. All investments carry a certain degree of risk, including the possible loss of principal and interest rate risk. There are specific risks that apply to each investment strategy. Environmental criteria limit the available investments compared with strategies with no such criteria. Under certain economic conditions, this could cause the performance of “green” fixed income accounts to be worse or better than similar accounts with no such criteria. There is no assurance that an investment will provide positive performance over any period of time.

Prospective clients should consult their financial advisor about investment strategies that are appropriate for their investment objectives, risk tolerance, tax status and liquidity needs. Income may be subject to the alternative minimum tax (AMT) and/or state and local taxes, based on the state of residence.