

## Wilshire empowers institutional investors to make climate-responsive investment decisions

*Educational video series features insights from well-respected institutional investors across the US, EU and China*

*“From Climate Taker to Climate Maker” in four simple steps*

**London, Santa Monica, California, October 12, 2021** – Wilshire, a leading global financial services firm, today announced the launch of a video series to help guide institutional investors in understanding the investment returns and risks of the climate challenge.

The series is designed to help institutional investors such as retirement plans, endowments and foundations discuss climate change with investment committees, evaluate the carbon savings “bang for buck” for different indexes and take practical steps to manage portfolio risks.

“We understand that making climate-responsive investments requires conversations from both climate advocates and efficient markets purists,” said Daniel E. Ingram, Senior Vice President at Wilshire. “Our goal is to help investors move to the other side of these discussions by drawing on a tried and tested process of healthy deliberation and robust analysis”, Ingram further stated.

Nili Gilbert, one of the video presenters and the Investment Committee Chair of the David Rockefeller Fund, said, “By reflecting the collective insights of all investors, markets appear to be efficient at pricing short term risks. However, markets may have a particular blind spot for efficient pricing in the long-term risks of climate change.”

The seven videos, two of which are being released today, provide high-quality educational content through interviews with industry-recognized institutional investors. The videos are designed to help equip the next generation of investment staff, trustees, beneficiaries and savers with useful tools to make more climate-responsive investment decisions as we approach net zero-emissions by 2050.

The series highlights four steps to becoming a Climate Maker:

1. **Climate risk assessment**, which measures the carbon intensity of a fund’s holdings.
2. **Prepare**. Investors can’t predict when climate risks will materialize but they can prepare portfolios.
3. **Evaluate the options**. Consider which indexes offer the best carbon saving per unit of active risk.
4. **Hold managers to account**. Investors should feel empowered to engage as environmental stewards of portfolio companies.

Mark Makepeace, CEO of Wilshire, said: “The profound impact of climate change on institutional portfolios creates both opportunities and challenges for investors. The important contributions of the

influential and knowledgeable experts that Daniel has so carefully and creatively curated will serve as an excellent educational resource for trustees and beneficiaries alike.”

Wilshire launched the series after being awarded the William and Flora Hewlett Foundation Environmental Program Grant in November 2020 to help empower investors to make climate-responsive decisions and help align passive asset management with the Paris climate goals. Wilshire also recently helped launch the Net Zero Investment Consultants Initiative with 11 other investment consulting firms. The Initiative lays out nine specific action points to support the goal of global net zero greenhouse gas emissions by 2050 or sooner.

View the first two of the seven educational videos [here](#). The next five videos will be released throughout October 2021.

### About Wilshire

Wilshire is a global provider of market-leading indexes, advanced analytics, and multi-asset investment solutions. A trusted partner to a diverse range of more than 500 leading institutional investors and financial intermediaries, our clients rely on us to improve investment outcomes for a better future. Wilshire advises on over \$1.3 trillion in assets and manages \$93 billion in assets and is headquartered in the United States with offices worldwide.

More information on Wilshire can be found at [www.wilshire.com](http://www.wilshire.com)

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