

VBI

OLIN VALUES BASED INVESTING

PROBLEM

Members of Generation Z are increasingly interested in investing their money into "good" companies. Each individual has their own values, so everyone has their own definition of a "good" company.

Several investment strategies exist for selecting "good" companies, with Environmental, Social, and Governance (ESG) investing being the most prominent. ESG investing, also known as values-based or impact investing, allows financial advisors to assess companies based on their environmental practices, social responsibility, and governance. Despite its popularity, ESG investing encounters key challenges.



OTHER SYSTEMS

Individual wants to align investments with personal values

1

Companies may report unverified, unstandardized data.



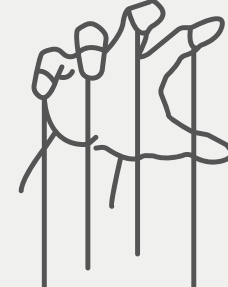
2

Data and scores may be a black box.



3

Metric creators define what "good" means.



DESIGN CONSIDERATIONS

Throughout this project, we collaborated with members of Gen Z, both current investors and aspiring investors, to co-design a value-based investing system that could meet their needs.

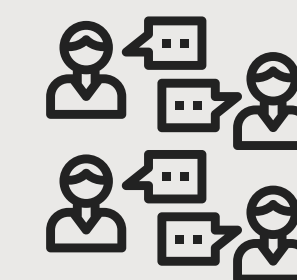
OUR USERS.....



Tend to prioritize human rights



Place more weight on "bad" actions than "good" actions



Majority of research is via word-of-mouth and social media



Need to be able to verify data and their sources

SOLUTION

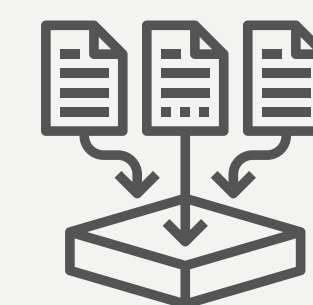
We created Olin Values-Based Investing (OVBI), a new metric for scoring company "goodness." Additionally, we created a proof of concept for our metric via a centralized platform that aims to match investors with companies that share their values.



OVBI

Individual wants to align investments with personal values

1



Verified 3rd party data

2



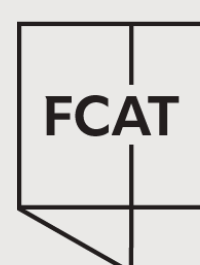
Open Source

3



User Determined

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