



## DESCRIPTION:

WCM Asset Management is Medium Risk. The company often yields to political activism in shaping corporate governance, potentially alienating consumers, dividing employees, and harming shareholders. The company implements race and identity-based policies that replace merit, excellence, and integrity with preferential treatment and outcomes. WCM Asset Management occasionally embraces corporate initiatives that redirect its central focus from business goals to partisan policies and divisive issues at times. This approach fails to safeguard free exercise, free speech, and free enterprise.

## Corporate Weaponization

**Has canceled customers, suppliers, or vendors due to their political views or religious beliefs OR corporately boycotts, divests, or sanctions regions, people groups, or industries. Medium Risk**

WCM Asset Management is a signatory of the Principles for Responsible Investment, incorporating ESG issues into investment analysis, decision-making, and other business practices [\(1\)](#)[\(2\)](#). The company has specific funds that do not invest in portfolios with significant stakes in high-risk industries such as firearms or gambling, though this is specific to those particular funds and not reflective of a larger company policy [\(3\)](#). However, neither WCM Asset Management nor its parent company Natixis have publicly fired customers, suppliers, or vendors based on political views or religious beliefs [\(4\)](#).

**Charitable giving (including employee matching programs) policies or practices discriminate against charitable organizations based on views or religious beliefs. Medium Risk**

WCM does not have an independent charitable giving program. Natixis will match donations "to organizations that promote the common good and benefit the general welfare of the community. By definition, this excludes organizations that promote single sectarian, denominational, or religious activities" [\(1\)](#).

**Employment policies fail to protect against viewpoint or other discrimination and/or are ideological in nature. Medium Risk**

WCM does not publish a nondiscrimination policy [\(1\)](#). However, Natixis does not provide viewpoint protections for its employees [\(2\)](#).

## Corporate Governance and Public Policy

**Uses corporate reputation to support causes, organizations, or policies hostile to freedom of expression.**

**High Risk**

*Natixis has released a "social and environmental responsibility" statement, committing the United Nations' Sustainable Development Goals (SDGs). This includes a "Green Weighting Factor" whereby the investment firm publishes and manages its allocation into "green" investments (1)(2). This metric does not explicitly require denying services to "brown" investments. Natixis has released statements in solidarity with the LGBTQ community (3). Natixis' CEO signed the CEO Action for Diversity & Inclusion pledge, which includes a commitment to promote DEI through bias education training in the workplace (4)(5).*

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**Uses corporate funds to advance ideological causes, organizations, or policies hostile to freedom of expression.**

**Lower Risk**

*WCM and Natixis have not used corporate funds to advance ideological causes, organizations, or policies (1)(2).*

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**Uses corporate political actions and/or financial contributions for ideological, non-business purposes.**

**Lower Risk**

*WCM does not operate a PAC or engage in lobbying at this time (1)(2)(3). Natixis has not used its PAC donations for ideological purposes and does not engage in lobbying at this time (4)(5)(6).*

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