

# CBIS Business Update Executive Summary



## Overview

As a leading manager of Catholic assets, we're keenly aware that the Catholic Church and Catholic investors — U.S. and non-U.S. alike — have been looking to CBIS for a more dynamic investment product lineup. In response, we made a strategic decision to significantly increase our resources commitment to the Catholic Responsible Investments Team, nearly doubling our previous expenditures.

We also determined that to cement our leadership position in the Catholic markets, we will need more resources than we could expect to generate through growth. Our solution is a strategic relationship with a global investment consultant and solutions provider to help build out the Investment Team and the CBIS investment lineup.



### Adding Investment Experience

Tom Digenan, CFA, CPA, along with John Geissinger, CFA, will serve as CBIS' Co-Chief Investment Officers. Tom and John will be overseeing the service, portfolio management, and impact and justice initiatives.

In anticipation of expanding our non-U.S. business, and as part of our plan to have investment talent outside the U.S., we have begun a search for a Europe-based portfolio manager.

See the announcement [here](#).



### A Strategic Relationship

Following numerous discussions with leading asset management firms, consultants, and trust companies across the industry, we determined that Mercer, one of the industry's largest investment consultant and solutions providers, was best positioned amongst its peers to help CBIS meet its product manufacturing needs.

As an extension of the CBIS Investment Team, Mercer will reinforce the integrity of the Catholic Responsible Investments process. Particularly exciting to us is the access to new asset classes and investment strategies this strategic relationship can bring, especially as we execute on our plans to position portfolio management resources outside the U.S.

For more detailed information, go to: [Expanded Strategic Relationship with Mercer](#).

## Bottom Line

In total, our commitment to adding resources and scale to the Catholic Responsible Investments Team enables our Catholic investment solutions to be more robust than anything we've done in our forty-plus years. CBIS is setting the stage to deliver on its commitment to provide compelling investment opportunities to devoted Catholics around the world.



## Important Information

Christian Brothers Investment Services Inc. ("CBIS," or, the "Adviser"), an Illinois corporation founded in 1981, serves as the investment adviser to the Funds.

## Contact Us

If you have any questions, please reach out to your CBIS representative:

 [info@cbisglobal.com](mailto:info@cbisglobal.com) or  (39) 080 919 9232