



THEMATIC INVESTING

Glenmede Energy Resilience Strategy

The energy transition is a fundamental shift in how energy is produced and consumed—moving toward systems that are more diversified, more resilient, and better suited to an increasingly electrified future. Focused on this transition, the Glenmede Energy Resilience Strategy invests in companies committed to resilient energy.

We believe strengthening the U.S. energy system to ensure reliable, consistent energy delivery will be essential in the years ahead. This need may create compelling long-term investment opportunities in both direct drivers and indirect contributors to the energy transition.

DIRECT DRIVERS

Companies developing, producing, or facilitating the delivery of energy technologies

Materials Companies



Supply critical inputs, such as lithium, copper, rare earth minerals, for energy technologies

Industrial Companies



Build and deploy energy-related infrastructure

Energy Companies



Develop and integrate fuels and alternative energy technologies

Utility Companies



Modernize grids and provide power delivery

Real Estate Companies



Implement energy-efficient technologies in our built environment

INDIRECT CONTRIBUTORS

Companies benefiting from or enabling the broader electrification and digital transformation



Financial Companies

Allocate capital to major energy infrastructure projects as well as alternative renewable energy development



Technology + Companies

Purchase large-scale energy infrastructure and develop the digital tools for energy optimization

From Framework to Execution: The Energy Resilience Investment Process

Seeking to build a portfolio that captures the shift from a primary fossil fuels-based economy to a more diversified national energy portfolio.



Defining an Investment Universe

- Screen companies based on sector-specific, Energy Transition-related metrics.
- Proprietary long buy ranking system to evaluate companies with strong long-term potential.



Qualitative Overlay

- Added layer of robust analysis is conducted to new names that enter the universe.
- Conducted in partnership with thematic research specialists and includes review of companies' business models, market positioning, and thematic relevance.



Quarterly Rebalances

- Collaborative process to reassess risk and ensure the portfolio continues to both capture the investment theme and maintain Glenmede's investment discipline.

FAQs

Is this a renewable energy strategy?

No. While renewable energy is an important component, the strategy focuses more broadly on energy resilience—which extends beyond renewables to include technologies such as natural gas, hydrogen, and nuclear. We take a holistic approach, seeking long-term investment opportunities across a diversified and evolving energy landscape.

What is the GICS sector exposure?

The thematic portfolio is primarily focused on select sectors that are deemed either direct drivers or indirect contributors to the Energy Transition. This includes Energy, Materials, Industrials, Utilities Real Estate, and Financials, as well as Technology companies and related industries.

What can I expect from the final portfolio?

The final portfolio is expected to hold approximately 45–60 large- and mid-cap U.S. equities. The strategy intends to maintain a value-oriented bias and is benchmarked against the Russell 1000 Index.

Why is the Energy Transition an investment opportunity currently?

Our world is becoming more technological and electrified — a shift that's creating growing demand for cleaner, more reliable, and diversified energy sources. This structural transformation may present a long-term investment opportunity as companies innovate to meet new energy needs and modernize the systems that power our economy.

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