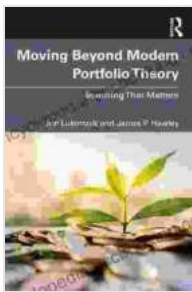


Moving Beyond Modern Portfolio Theory: Investing That Matters

Modern Portfolio Theory (MPT) has been the dominant investment framework for decades. It's based on the idea that investors can reduce risk and improve returns by diversifying their portfolios across different asset classes, such as stocks, bonds, and real estate. While MPT has been successful in helping investors achieve their financial goals, it has several limitations that make it less effective in today's complex and rapidly changing investment landscape.



Moving Beyond Modern Portfolio Theory: Investing That Matters

★★★★☆ 4.3 out of 5

Language : English
File size : 2632 KB
Text-to-Speech : Enabled
Screen Reader : Supported
Enhanced typesetting : Enabled
Word Wise : Enabled
Print length : 144 pages



The Shortcomings of Modern Portfolio Theory

1. **MPT is backward-looking.** It relies on historical data to estimate risk and return, which may not be indicative of future performance. In today's rapidly changing world, historical data is becoming less and less reliable.

2. **MPT ignores non-financial factors.** MPT focuses solely on financial metrics, such as risk and return. It does not take into account environmental, social, and governance (ESG) factors, which are becoming increasingly important to investors.
3. **MPT can lead to short-term thinking.** MPT's focus on quarterly earnings and short-term performance can lead investors to make decisions that are not in their long-term best interests.

Investing That Matters

There is a growing movement of investors who are looking for more than just financial returns from their investments. They want to invest in companies that are making a positive impact on the world. This new approach to investing is known as "investing that matters."

Investing that matters is about aligning your investments with your values. It's about investing in companies that are committed to sustainability, social responsibility, and good governance. It's also about investing in companies that are creating long-term value for their shareholders.

Investing that matters is not just about doing good. It's also about doing well. Studies have shown that companies with strong ESG performance tend to outperform their peers over the long term. This is because these companies are better equipped to manage risk, attract and retain customers, and attract top talent.

How to Invest That Matters

There are many ways to invest that matters. You can invest in individual companies that meet your ESG criteria. You can also invest in mutual funds

or exchange-traded funds (ETFs) that focus on sustainability or impact investing.

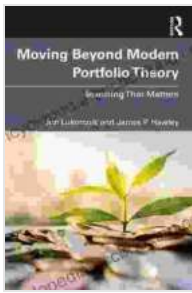
No matter how you choose to invest, it's important to do your research and understand the companies you're investing in. Make sure you're comfortable with their values and their commitment to sustainability.

Investing that matters is not just a trend. It's a fundamental shift in the way people think about investing. As more and more investors realize the importance of aligning their investments with their values, the demand for sustainable and impact investments will continue to grow.

Modern Portfolio Theory has been a valuable investment framework for decades, but it's time to move beyond its limitations. Investing that matters is a new approach to investing that focuses on sustainability, impact, and long-term value creation. This approach is not just about ng good. It's also about ng well. By aligning your investments with your values, you can make a positive impact on the world while achieving financial success.

To learn more about investing that matters, I encourage you to read my new book, ***Moving Beyond Modern Portfolio Theory: Investing That Matters***. In this book, I provide a comprehensive overview of the shortcomings of MPT and introduce a new approach to investing that is designed to help you achieve your financial goals while making a positive impact on the world.

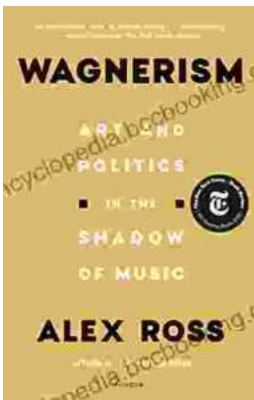
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