

IMPACT INVESTING MONTHLY

October 2025

Your monthly update on impact investing

Impact Investing at AOWM

Seeking companies that
turn a profit making a
sustainable impact on
society and the
environment

October's update includes a company highlight on Nextracker, videos on ChatGPT and artificial intelligence, and links to further resources on these fronts. As always, if you would like to talk about impact investing in general or your impact portfolio specifically, please do not hesitate to email me.

Grace and Peace,



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Highlight on Nextracker Inc.

Nextracker Inc. (nextracker.com) is a renewable energy company whose primary product enables solar panels to track the sun's movement across the sky. This technology helps solar panels generate far more electricity on a wider variety of terrains. You can see an overview of Nextracker's solar trackers [here](#), as well as work it is doing in "[agrivoltaics](#)."



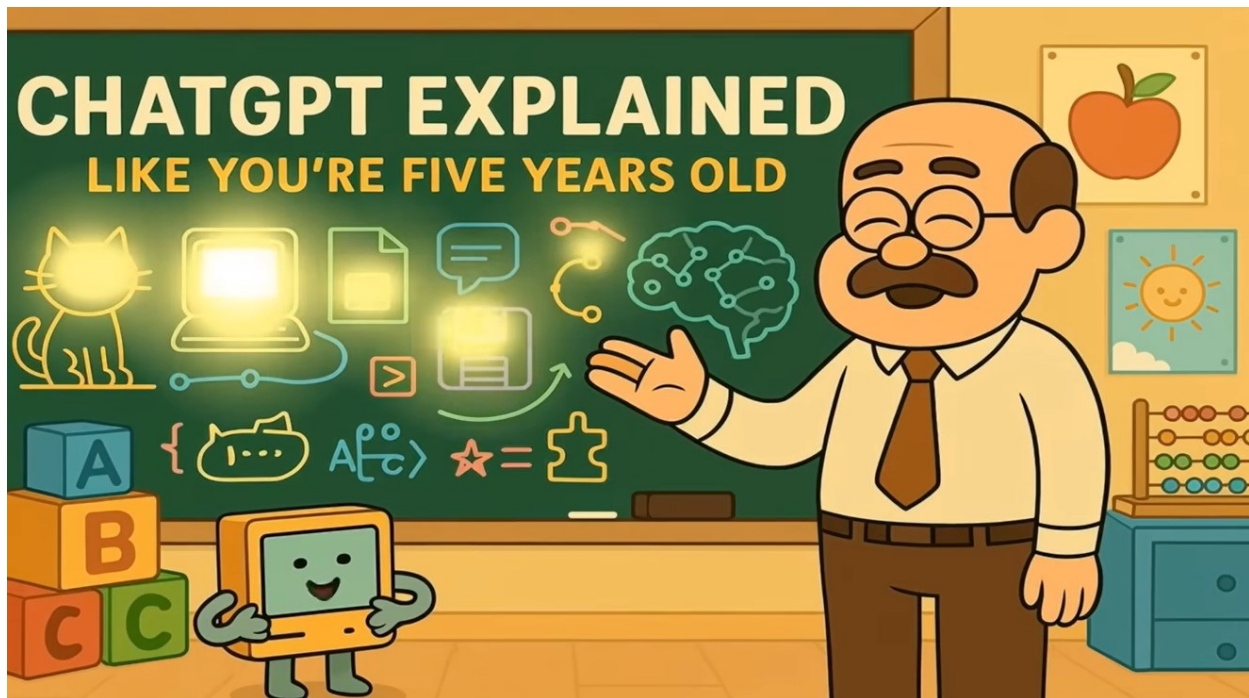
Founded in 2014, Nextracker is headquartered in Fremont, CA, and its client base extends across 40 countries. Nextracker's [mission](#) is to "be the most trusted and valued renewable energy company by delivering intelligent, reliable, and productive solar power," and its vision is "a world powered by renewable energy where clean, affordable power is available to all."¹ See more info about Nextracker on its [YouTube page](#), as well as in its most recent [Sustainability Report](#).

¹ Nextracker Sustainability Report FY 25, p. 21

Videos of the Month

(Click on the images to view)

The next couple months we will have charts and videos focused on AI. Our first video this month, [“Breaking Down How ChatGPT Actually Works”](#) (11 min), comes from series called “Explaining Tech Like You’re Five,” which is handy. The second video is a PBS NOVA documentary called [“A.I. Revolution”](#) (54 min), which gives a broader overview of artificial intelligence past and present. You can click on the images below to watch the respective videos.



Resources

Chatbots Decoded: Exploring AI

Computer History Museum

Online Exhibit
(browse at will)

The Origins of AI

AI: Unpacking The Black Box

PBS Sept 10, 2024
(27 min video)

What is artificial intelligence (AI)?

Cole Stryker and Eda Kavlakoglu

IBM
(10 min read)

How the U.S. Public and AI Experts

View Artificial Intelligence

Pew Research Center
April 3, 2025
(7 min read)

What is Impact Investing?

The term “**Impact Investing**” focuses on investments made *“with the intention to generate positive, measurable social and environmental impact alongside a financial return.”*¹ Many people talk about this intersection of social, environmental, and financial values as a focus on the **triple bottom line** of **people, planet, and profit**.² Others also highlight the ways that environmental, social, and financial values are really “**blended values**,”³ given that the operations, products, and services of any business always have effects (whether positive or negative) on society, the environment, and the financial bottom line. A common definition of “**sustainability**” along these lines is *“meet[ing] the needs of the present without compromising the ability of future generations to meet their own needs.”*⁴

“**ESG**” is a term that stands for “Environmental, Social, and Governance” factors that can affect a company’s long term financial health as well as well-being for broader society and the environment. The term ESG was coined in a 2004 United Nations report entitled, “Who Cares Wins: Connecting Financial Markets to a Changing World,” and this report highlights the ways *“successful investment depends on a vibrant economy, which depends on a healthy civil society, which is ultimately dependent on a sustainable planet.”*⁵

ESG analysis usually focuses primarily on how a changing world (socially and environmentally) might affect a company’s financial return. Impact analysis usually focuses on how a company’s operations and products affect society and the environment. The two types of analysis are distinct but complementary and can be used to help you blend your values with your investments.

Sources

¹ [Thegiin.org](https://thegiin.org); see also rockefellerfoundation.org/from-the-archives/global-impact-investing-network-giin/

² “Triple bottom line,” *The Economist*, Nov 17, 2009. economist.com/news/2009/11/17/triple-bottom-line

³ [Blendedvalue.org](https://blendedvalue.org)

⁴ *Our Common Future*, UN World Commission on Development and Environment, 1987, p. 24

⁵ [UNepfi.org/fileadmin/events/2004/stocks/who_cares_wins_global_compact_2004.pdf](https://unepfi.org/fileadmin/events/2004/stocks/who_cares_wins_global_compact_2004.pdf)

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