

Impact Report



ESG Aggressive

July 13, 2021

Metrics compared to Custom Benchmark: Aggressive Benchmark

Impact Breakdown Relative to Peers



YOUR TOP HOLDINGS

BAFWX CISIX
PFPWX ARAIX
GCEUX CWVIX
NEXTX MISFX
CSVIX IHI

Impact Highlights

Most Positive Metrics

-91 %

DEFORESTATION PRODUCERS EXPOSURE

+29 %

CLEAN ENERGY COMPANIES

-66 %

FOSSIL FUEL INDUSTRY EXPOSURE

-63 %

PRISON INDUSTRY EXPOSURE

-49 %

MIGRANT DETENTION INVOLVEMENT

+6 %

WOMEN ON BOARDS

-31 %

ANIMAL EXPLOITATION

+24 %

ARBITRATION FOR SEXUAL HARASSMENT PROHIBITED

-\$3.5 million

WAGE AND HOUR VIOLATIONS (\$)

+100 %

POLITICAL TRANSPARENCY VOTING SUPPORT

-\$133.5 million

BRIBERY, CORRUPTION, AND FRAUD VIOLATIONS (\$)

-\$18.3 million

PRODUCT SAFETY VIOLATIONS (\$)

-77 %

WEAPON INDUSTRY EXPOSURE

-100 %

TOBACCO PRODUCER EXPOSURE

-\$82415

WORKPLACE HEALTH AND SAFETY VIOLATIONS (\$)

Shareholder Advocacy Highlights

COMPANIES CHANGED

HEALTH

5

ENVIRONMENT

38

HUMAN RIGHTS

11

EQUAL OPPORTUNITY

264

ACCOUNTABILITY

8



Green Century Pushed Darden Restaurants to Eliminate the Use of Medically Important Antibiotics in its Supply Chain

[Report](#)



Parnassus pushes Amazon to set aside \$10 billion for hazard pay at the start of the COVID pandemic

[Report](#)



Eaton Vance (Calvert) pushes Walmart to change gun policy and fight for stronger safety regulations

[Report](#)



Green Century pushed Kraft Heinz to increase plant-based protein

[Website](#)



BlackRock engages 2 drug retailers to update reporting on governance in opioid-related risks, 1 makes change

[Report](#)



BlackRock pushes automobile company to cancel contract with company violating human rights

[Report](#)



Green Century secured a policy from Dr Pepper Snapple to require all of its agricultural suppliers to reduce their use of pesticides to pro...

[Report](#)



Eaton Vance (Calvert) pushes Tesla to publish first-ever "Impact Report"

[Report](#)



Eaton Vance (Calvert) pushes Hawaiian Electric to link executive compensation with renewable energy use

[Website](#)



Eaton Vance (Calvert) pushes 27 companies to disclose EEO-1 diversity data

[Website](#)



Parnassus pushes Microsoft to commit to being carbon negative by 2030

[Report](#)



Parnassus pushes Mondelez, Masco, Hologic, and IDACORP to disclose EEO-1 diversity data

[Report](#)



BlackRock pushes Verizon Wireless to commit to carbon neutrality by 2035

[Report](#)



BlackRock pushes technology company to reduce excessive executive pay

[Report](#)



Green Century funded the Overseas Private Investment Corporation Bond to finance the construction of ten solar power plants in rural, low-i...

[Report](#)



Nuveen pushes 150 companies to add female board members across Japan and the USA

[Report](#)

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Methodology

Comparison calculation methodology

This report compares two selected portfolios: **ESG Aggressive** and **Aggressive Benchmark**. Both portfolios were chosen by the advisor. The displayed comparisons represent a dollar-weighted average based on the portfolio constituents with data coverage for each metric. For example, 30% less animal exploitation (-30%) means that, as a dollar-weighted average, 30% fewer constituents in **ESG Aggressive** have ties to animal testing and animal food products, compared to the portfolio selected for comparison (**Aggressive Benchmark**). Funds are assigned a value for each metric based on a dollar-weighted average of the companies held by that fund with data coverage for that metric.

Impact breakdown relative to peers

This section measures a portfolio's relative performance in 5 major issue areas (Health, Environment, Human Rights, Equal Opportunity, Accountability) according to the following process.

For each displayed metric, the comparison between the two portfolios, (ESG Aggressive and Aggressive Benchmark), are ranked against the benchmark comparisons for that metric for all funds in our database. These ranks are averaged by issue category. These averages are weighted by a factor representing the coverage of each metric within a portfolio. For portfolios that include funds, managers' shareholder engagement activities are included in the overall category comparisons.

Coverage

This report is based on the portion (96%) of your portfolio, and the portion (100%) of the benchmark selected for comparison, covered by YourStake. YourStake's coverage universe consists of public equities, public equity funds, and corporate bond funds. Fund coverage is calculated as the dollar weighted percentage of the fund held in corporate equities or fixed income instruments covered by YourStake. The metrics displayed in this report are based on the selected ESG issues for this portfolio. If no ESG issues are selected, then the top metrics based on coverage and relevance in this report are displayed by default.

Appendix of Data

Weapon Industry Exposure	Companies involved in the manufacture or sale of weapons.	NGO Watchdog
Tobacco Producer Exposure	Companies involved in the production of tobacco.	NGO Watchdog
Workplace Health and Safety Violations	Penalties paid to the US Government for workplace health and safety failures.	Government
Toxic Air Pollution	Harm done by toxic air pollution released in the U.S. by the company, using EPA data.	Academia
Deforestation Producers Exposure	Agricultural commodity producers and traders linked to deforestation	NGO Watchdog
Clean Energy Companies	Companies with highest clean energy revenues.	NGO Watchdog
Fossil Fuel Industry Exposure	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
Animal Exploitation	Is a company involved in animal testing, and/or food + clothing containing animal products.	NGO Watchdog
Arbitration for Sexual Harassment Prohibited	Has a company prohibited the use of arbitration for sexual harassment.	NGO Watchdog
Wage and Hour Violations	Penalties paid to the US Government for exploiting wage laborers.	Government
Prison Industry Exposure	Does a company have direct financial ties to the prison industry	NGO Watchdog
Migrant Detention Involvement	Does a company have direct financial ties to US Migrant Detention Centers	NGO Watchdog
Women on Boards	Percent of a company's board of directors filled by women.	NGO Watchdog
Political Transparency Voting Support	Percent of mutual fund proxy votes in support of increased political spending disclosure.	SEC
Bribery, Corruption, and Fraud Violations	Penalties paid to the US Government for bribery, corruption, and fraud.	Government
Product Safety Violations	Penalties paid to the US Government for unsafe products.	Government
Companies Changed	Number of companies that improved, or committed to improve social/environmental disclosure or performance following shareholder engagement by a mutual fund in your portfolio over the last two years.	Company Reporting