



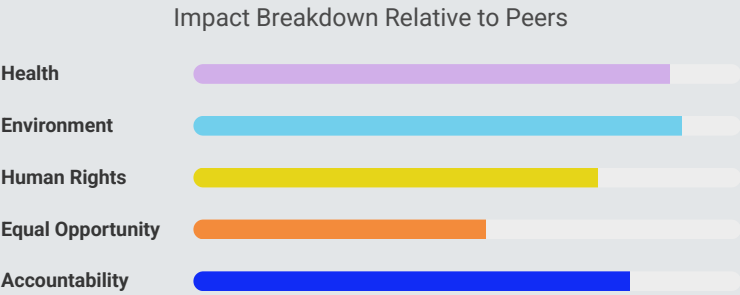
Impact Report



ESG Moderate Aggressive

July 13, 2021

Metrics compared to Custom Benchmark: Moderate Aggressive Composite Benchmark



YOUR TOP HOLDINGS

TSBIX ARAIX
ESGYX CFOIX
GCEUX IHI
BAFWX CUBIX
NEXTX CSVIX

Impact Highlights

Most Positive Metrics

-51 %
DEFORESTATION PRODUCERS EXPOSURE

+161 % CLEAN ENERGY COMPANIES **-53 %** FOSSIL FUEL INDUSTRY EXPOSURE

-13 %
ANIMAL EXPLOITATION



+1 %
POLITICAL SPENDING DISCLOSURE SCORE

-\$26.4 million
BRIBERY, CORRUPTION, AND FRAUD VIOLATIONS (\$)

-63 %
TOXIC AIR POLLUTION

Shareholder Advocacy Highlights

COMPANIES CHANGED

HEALTH

6

ENVIRONMENT

43

HUMAN RIGHTS

12

EQUAL OPPORTUNITY

265

ACCOUNTABILITY

10



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

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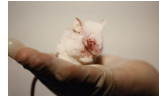
Parnassus pushes Agilent to pledge no layoffs at the start of the COVID pandemic

[Report](#)



Natixis (Mirova) pushes Roche to join the Access To Medicine Index

[Report](#)



Green Century pushed Kraft Heinz to increase plant-based protein

[Website](#)



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

[Report](#)



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

[Report](#)



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

[Report](#)



Natixis (Mirova) designs human rights impact metrics to be used by OsloFjordVarne

[Report](#)



BlackRock pushes Verizon Wireless to commit to carbon neutrality by 2035

[Report](#)



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](#)



Green Century pushes Kellogg to protect forests, buy 99.5% of palm oil from certified sustainable land

[Report](#)



BlackRock pushes technology company to reduce excessive executive pay

[Report](#)



Natixis (Mirova) pushes Repsol to reduce carbon intensity by 40% by 2040

[Report](#)



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

[Report](#)

Disclaimer

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Methodology

Comparison calculation methodology

This report compares two selected portfolios: **ESG Moderate Aggressive** and **Moderate Aggressive Composite 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 Moderate Aggressive** have ties to animal testing and animal food products, compared to the portfolio selected for comparison (**Moderate Aggressive Composite 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 Moderate Aggressive and Moderate Aggressive Composite 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 (83%) of your portfolio, and the portion (81%) 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

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
Environmental Violations	Penalties paid to the US Government for harming the environment.	Government
Animal Exploitation	Is a company involved in animal testing, and/or food + clothing containing animal products.	NGO Watchdog
Political Spending Disclosure Score	How transparent is a company around its political spending and lobbying frameworks and expenditures.	NGO Watchdog
Bribery, Corruption, and Fraud Violations	Penalties paid to the US Government for bribery, corruption, and fraud.	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