



Impact Report

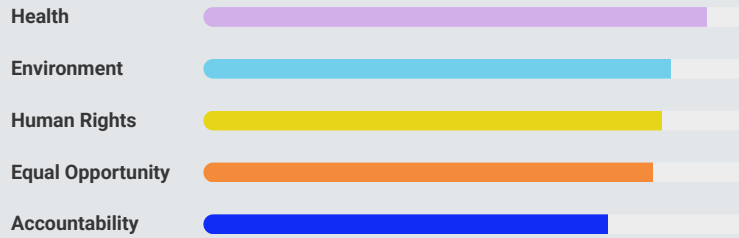


ESG Moderate

July 13, 2021

Metrics compared to Custom Benchmark: Moderate Benchmark

Impact Breakdown Relative to Peers



YOUR TOP HOLDINGS

CRANX GCBLX
TSBIX CSVIX
CFOIX CISIX
ESGYX SEBFX
LMRNX PFPMX

Impact Highlights

Most Positive Metrics

-61 %

MIGRANT DETENTION INVOLVEMENT

-38 %

PRISON INDUSTRY EXPOSURE

-31 %

CEO PAY

-46 %

DEFORESTATION PRODUCERS EXPOSURE

+11 %

CLEAN ENERGY COMPANIES

-61 %

FOSSIL FUEL INDUSTRY EXPOSURE

-31 %

ANIMAL EXPLOITATION

-\$63.3 million

BRIBERY, CORRUPTION, AND FRAUD VIOLATIONS (\$)

-79 %

TOXIC AIR POLLUTION



Shareholder Advocacy Highlights

COMPANIES CHANGED

HEALTH

6

ENVIRONMENT

41

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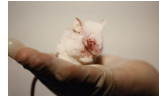
Parnassus pushes Amazon to set aside \$10 billion for hazard pay at the start of the COVID pandemic

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

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Green Century pushed Tyson Foods to eliminate gestation crates

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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

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

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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 Republic Services to set science-based 1.5 degree climate targets

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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

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Green Century pushed Kroger and Aramark to commit to zero-deforestation

[Website](#)



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

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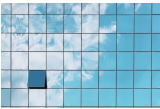
Natixis (Mirova) pushes Capgemini to tie director compensation to social responsibility performance
[Report](#)



Nuveen pushes a company to disclose ESG factors in proxy statement or report
[Report](#)



Parnassus pushes 5 companies to publish or improve their sustainability reports
[Report](#)



BlackRock pushes mining company to improve executive oversight of sustainability issues
[Report](#)

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Methodology

Comparison calculation methodology

This report compares two selected portfolios: **ESG Moderate** and **Moderate 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** have ties to animal testing and animal food products, compared to the portfolio selected for comparison (**Moderate 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 and Moderate 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 (71%) of your portfolio, and the portion (73%) 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
Migrant Detention Involvement	Does a company have direct financial ties to US Migrant Detention Centers	NGO Watchdog
Prison Industry Exposure	Does a company have direct financial ties to the prison industry	NGO Watchdog
CEO Pay	Ratio of CEO pay to median worker pay	SEC
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