

Your Impact

If you invest \$1M in your portfolio, over 10 years you will be responsible for the equivalent of:

25 fewer copd cases

compared to the total U.S. stock market based on the number of equivalent cigarettes produced by a company.



249 fewer drunk driving episodes

compared to the total U.S. stock market based on the number of equivalent alcoholic drinks produced by a company.



13,442 fewer fish harmed from plastic

compared to the total U.S. stock market based on annual production of plastics that reach the ocean.



491 more homes powered by clean energy

compared to the total U.S. stock market based on equivalent clean energy production based on clean revenue (top 200 clean revenue companies only).



121 fewer hours of incarceration

compared to the total U.S. stock market based on the number of individuals detained.



8 more jobs supported

compared to the total U.S. stock market based on the number of jobs supported by a company.



10 fewer guns produced

compared to the total U.S. stock market based on the amount of guns produced by manufacturers.



189 more meetings led by women

compared to the total U.S. stock market based on number of women in management positions.



1,209,814 fewer pieces of plastic in the ocean

compared to the total U.S. stock market based on annual production of plastics that reach the ocean.



17 fewer smoking-related hospital days

compared to the total U.S. stock market based on the number of equivalent cigarettes produced by a company.



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Investing involves risk. Depending on the types of investments, there may be varying degrees of risk. Socially responsible investing does not guarantee any amount of success. This analysis may not provide a complete picture of the social impact as it is only as reliable as the amount of data available.

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Methodology

Benchmark comparison calculation methodology:

This report represents a comparison between the selected portfolio, **ESG Moderate Aggressive**, and the total US equity market, nominally represented by the Vanguard Total Stock Market Index Fund. The submitted portfolio is compared to Vanguard Total Stock Market Index Fund based on the stated \$ amount invested, as indicated at the top of the report. The relevant metrics are calculated for the portfolio and the benchmark on the basis of ownership percentage of each company. For example, a portfolio that owns 1% of a company that slaughters 1,000,000 chickens is proportionally responsible for 10,000 chickens slaughtered. Each metric has a different methodology and source for converting raw data into metaphors. For example, a factor from the EPA is used to convert carbon emissions to miles driven.

Portfolio Value

In order to make output more readable, for portfolios with under \$10 million in assets covered by YourStake.org, the portfolio value is scaled up to \$10 million to calculate annual metrics, and displayed as \$1 million over 10 years, keeping holdings and company activities constant. For example, a portfolio with \$300 in Company A and \$200 in Company B is scaled up to a portfolio with \$6 million in Company A and \$4 million in Company B, and associated metaphors reflect the annual metrics associated with this scaled up portfolio. For portfolios with \$10 million or more in assets covered by YourStake.org, the portfolio value displayed is the amount covered by YourStake.org.

YourStake's coverage universe consists of public equities, public equity funds, and corporate bond funds. The metaphors displayed in this report are based on the selected metrics for this portfolio.

Appendix of Data

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| Cigarettes Produced | The number of equivalent cigarettes produced by a company. | Annual Reports from Cigarette Producers |
| Alcoholic Drinks Produced | The number of equivalent alcoholic drinks produced by a company. | Annual Reports from Alcohol Producers |
| Plastics in the ocean | Annual production of plastics that reach the ocean. | Annual Reports from Petrochemical and Packaging Companies |
| Clean Energy | Equivalent clean energy production based on clean revenue (top 200 clean revenue companies only). | Annual Reports and Carbon Clean200 |
| Individuals Incarcerated | The number of individuals detained. | Annual Reports from Prison and Detention Companies |
| Jobs Supported | The number of jobs supported by a company. | Annual Reports |
| Loaded Guns Produced | The amount of guns produced by manufacturers. | Annual Reports from Gun Manufacturers |
| Women in Management Positions | Number of women in management positions. | Company Reports |
| Plastics in the ocean | Annual production of plastics that reach the ocean. | Annual Reports from Petrochemical and Packaging Companies |
| Cigarettes Produced | The number of equivalent cigarettes produced by a company. | Annual Reports from Cigarette Producers |