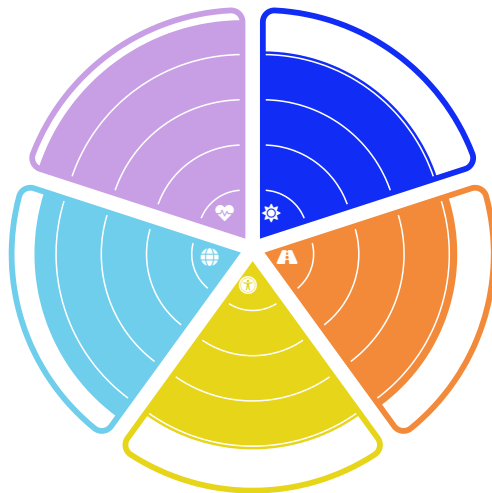


JULY 27, 2022

## Companies Changed

CATEGORY	#
Health	6
Environment	39
Human Rights	11
Equal Opportunity	266
Accountability	10



## Your Top Holdings

BPESX	CISIX
BAFWX	GCEUX
NEXTX	CWVIX
PFPWX	ARAIX
NUSC	MISFX

Metrics compared to the portfolio: Aggressive Benchmark

Health	Environment	Human Rights	Equal Opportunity	Accountability
Tobacco Producer Exposure <b>-100%</b> ✓	Clean Energy Companies <b>+13%</b> ✓	Forced Arbitration for Sexual Harassment <b>-50%</b> ✓	Migrant Detention Involvement <b>-31%</b> ✓	Political Spending Disclosure Score <b>-27%</b>
Weapon Industry Exposure <b>-84%</b> ✓	Single Use Plastics Companies <b>-71%</b> ✓	Wage and Hour Violations <b>-\$7.0 million</b> ✓	Prison Industry Exposure <b>-54%</b> ✓	Political Transparency Voting Support <b>+88%</b> ✓
Toxic Air Pollution <b>-61%</b> ✓	Deforestation Producers Exposure <b>-87%</b> ✓	Ethical Recruitment Score <b>-11%</b>	Women on Boards <b>+12%</b> ✓	Bribery, Corruption, and Fraud Violations <b>-\$84.8 million</b> ✓

Health and Safety  
Violations

**-\$153,631**



Fossil Fuel Industry  
Exposure

**-75%**



Uyghur Forced Labor  
Exposure

**-40%**



Discrimination Violations

**-\$2.3 million**



Financial Crimes

**-\$249.3  
million**



# Shareholder Advocacy



## Health



Green Century pushed Darden Restaurants to reduce antibiotics use in its chicken supply chain by 2023.

[Report](#)



## Health



Parnassus pushes Micron to be an early adopter of increased facility sanitation at the start of the COVID pandemic

[Report](#)



## Environment



Parnassus pushes Republic Services to set science-based 1.5 degree climate targets

[Report](#)



## Environment



Green Century pushed Coca-Cola to reduce its use of virgin plastic by 3 million metric tons

[Report](#)



## Human Rights



Green Century pushed Hormel Foods to phase out gestation crates

[Report](#)



## Human Rights



Parnassus pushes VF Corporation to ensure 100% pay and benefits for retail employees at the start of the COVID pandemic

[Report](#)



## Equal Opportunity



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

[Report](#)



## Equal Opportunity



BlackRock pushes technology company to reduce excessive executive pay

[Report](#)



## Accountability



Eaton Vance (Calvert) pushes Sempra to report on climate lobbying

[Report](#)



## Accountability



Green Century pushed CSX to report on climate denial lobbying

[Website](#)

## Disclaimer

Data in this report pertain only to social impact, not financial performance. Stake PBC is not an investment advisor, and does not provide investment advice or investment recommendations. The information contained herein is believed to be from reliable sources, but we make no warranty or guarantee as to the accuracy of the information. Information provided is as of July 27, 2022, and may change over time based on market or other conditions. The holdings of **ESG Aggressive** are as of July 27, 2022, and the holdings of **Aggressive Benchmark** are as of July 13, 2021. Please consult with your advisor for more details about any of the metrics displayed in this report.

We define countries as the entities that exercise or have previously exercised sovereign authority over autonomous regions. We do not mean to make any claims regarding the political status of such autonomous regions, and recognize the political status of some territories may be in dispute. Country-based metrics are applied to securities we believe have been issued by country-controlled entities, such as the United States Department of the Treasury. We determine entities controlled by countries based upon available data sources, but make no warranty or guarantee that such attribution is accurate or complete for all entities in our database.

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

✓ Metrics marked with a check are better than the benchmark.

### 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.

### Nightingale-Rose Chart

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.

The overall comparison is a coverage-weighted average of the comparison between the two portfolios, **ESG Aggressive** and **Aggressive Benchmark**, for each of the metrics displayed in the report across each of the major issue areas. For portfolios that include funds, managers' shareholder engagement activities are included in the overall comparisons for each of the 5 major issue areas if at least three companies have improved, or committed to improve disclosure or performance in that issue area following shareholder engagement by the fund managers in your portfolio over the last two years.

### Coverage

This report is based on the portion (99%) 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

<b>Tobacco Producer Exposure</b>	Companies that produce cigarettes or tobacco products.	SEC
<b>Weapon Industry Exposure</b>	Companies involved in the manufacture or sale of weapons.	NGO Watchdog
<b>Toxic Air Pollution</b>	Harm done by toxic air pollution released in the U.S. by the company, using EPA data.	Academia
<b>Health and Safety Violations</b>	Penalties paid to the US government or UK government for public and workplace health and safety failures.	Government
<b>Clean Energy Companies</b>	Companies with the highest clean economy revenues, and pure-play clean energy companies.	SEC
<b>Single Use Plastics Companies</b>	Companies that produce plastic.	SEC
<b>Deforestation Producers Exposure</b>	Agricultural commodity producers and traders linked to deforestation	NGO Watchdog
<b>Fossil Fuel Industry Exposure</b>	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
<b>Forced Arbitration for Sexual Harassment</b>	Does a company force the use of arbitration for sexual harassment.	NGO Watchdog
<b>Wage and Hour Violations</b>	Penalties paid to the US government or UK government for exploiting wage laborers.	Government
<b>Ethical Recruitment Score</b>	How well do companies prevent restriction of worker movement and recruitment fees in their supply chains.	NGO Watchdog
<b>Uyghur Forced Labor Exposure</b>	Companies tied to human rights abuses in Xinjiang, China.	Academia
<b>Migrant Detention Involvement</b>	Does a company have direct financial ties to US Migrant Detention Centers	NGO Watchdog
<b>Prison Industry Exposure</b>	Does a company have direct financial ties to the prison industry.	NGO Watchdog
<b>Women on Boards</b>	Percent of a company's board of directors filled by women.	NGO Watchdog
<b>Discrimination Violations</b>	Penalties paid to the US government or UK government for employment or consumer access discrimination.	Government
<b>Political Spending Disclosure Score</b>	How transparent is a company around its political spending and lobbying frameworks and expenditures.	NGO Watchdog
<b>Political Transparency Voting Support</b>	Percent of mutual fund proxy votes in support of increased political spending disclosure.	NGO Watchdog
<b>Bribery, Corruption, and Fraud Violations</b>	Penalties paid to the US government or UK government for bribery, corruption, and fraud.	Government
<b>Financial Crimes</b>	Penalties paid to the US government or UK government for insider trading, market manipulation, and improper securities sales.	Government
<b>Companies Changed</b>	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