

JULY 27, 2022

Companies Changed

CATEGORY	#
Health	7
Environment	34
Human Rights	10
Equal Opportunity	260
Accountability	11



Your Top Holdings

CFOIX	SEBFX
CRANX	CISIX
PEGIX	TSBIX
GCBUX	MGGYX
CUBIX	ARAIX

Metrics compared to the portfolio: Conservative Benchmark

Health	Environment	Human Rights	Equal Opportunity	Accountability
Tobacco Producer Exposure -100% ✓	Clean Energy Companies +2% ✓	Animal Exploitation -33% ✓	Prison Industry Exposure -25% ✓	Political Transparency Voting Support +96% ✓
Weapon Industry Exposure -64% ✓	Fossil Fuel Industry Exposure -48% ✓	Wage and Hour Violations -\$12.7 million ✓	Migrant Detention Involvement -39% ✓	Russia Exposure +36%
Health and Safety Violations -\$724,516 ✓	Deforestation Producers Exposure -31% ✓	Forced Arbitration for Sexual Harassment -40% ✓	Money Bail Involvement -97% ✓	Political Spending Disclosure Score -8%

Toxic Air Pollution

-79%



Single Use Plastics
Companies

-73%



Data Privacy Violations

-\$26.2 million



Women on Boards

-4%

Bribery, Corruption, and
Fraud Violations

-\$93.6 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



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

[Report](#)



Environment



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

[Report](#)



Human Rights



Green Century pushed Hormel Foods to phase out gestation crates

[Report](#)



Human Rights



Parnassus pushes Amazon to set aside \$10 billion for hazard pay 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



Eaton Vance (Calvert) pushes 6 companies to improve board and executive diversity

[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](#)

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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 Conservative** and **Conservative 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 Conservative** have ties to animal testing and animal food products, compared to the portfolio selected for comparison (**Conservative 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 Conservative and Conservative 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 (64%) of your portfolio, and the portion (96%) 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

Tobacco Producer Exposure	Companies that produce cigarettes or tobacco products.	SEC
Weapon Industry Exposure	Companies involved in the manufacture or sale of weapons.	NGO Watchdog
Health and Safety Violations	Penalties paid to the US government or UK government for public and 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
Clean Energy Companies	Companies with the highest clean economy revenues, and pure-play clean energy companies.	SEC
Fossil Fuel Industry Exposure	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
Deforestation Producers Exposure	Agricultural commodity producers and traders linked to deforestation	NGO Watchdog
Single Use Plastics Companies	Companies that produce plastic.	SEC
Animal Exploitation	Is a company involved in animal testing, and/or food + clothing containing animal products.	NGO Watchdog
Wage and Hour Violations	Penalties paid to the US government or UK government for exploiting wage laborers.	Government
Forced Arbitration for Sexual Harassment	Does a company force the use of arbitration for sexual harassment.	NGO Watchdog
Data Privacy Violations	Penalties paid to the US government or UK government for abusing data privacy.	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
Money Bail Involvement	Companies involved in money bail services.	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.	NGO Watchdog
Russia Exposure	Russian companies, companies traded on Russian exchanges, and companies with ties to Russia.	SEC
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 or UK 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