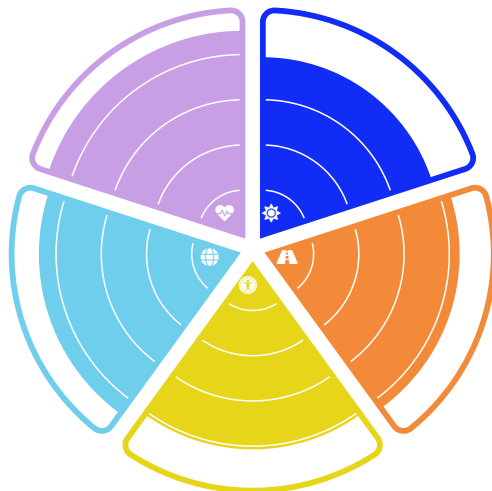


JULY 27, 2022

Companies Changed

CATEGORY	#
Health	7
Environment	46
Human Rights	13
Equal Opportunity	267
Accountability	12



Your Top Holdings

CRANX	TSBIX
CFOIX	ARAIX
LMRNX	PFPMX
GCBUX	CISIX
ESGYX	SEBFX

Metrics compared to the portfolio: Moderate Benchmark

Health	Environment	Human Rights	Equal Opportunity	Accountability
<p>Toxic Air Pollution</p> <p>-67%</p> <p>✓</p>	<p>Clean Energy Companies</p> <p>-2%</p> <p>✓</p>	<p>Animal Exploitation</p> <p>-25%</p> <p>✓</p>	<p>Migrant Detention Involvement</p> <p>-37%</p> <p>✓</p>	<p>Political Spending Disclosure Score</p> <p>-12%</p> <p>✓</p>
<p>Toxic Water Pollution</p> <p>-79%</p> <p>✓</p>	<p>Fossil Fuel Industry Exposure</p> <p>-64%</p> <p>✓</p>	<p>Anti-Forced Labor Score</p> <p>+2%</p> <p>✓</p>	<p>Prison Industry Exposure</p> <p>-37%</p> <p>✓</p>	<p>Bribery, Corruption, and Fraud Violations</p> <p>-\$95.7 million</p> <p>✓</p>
<p>Gun & Ammunition Exposure</p> <p>-22%</p> <p>✓</p>	<p>Deforestation Producers Exposure</p> <p>-59%</p> <p>✓</p>	<p>Data Privacy Violations</p> <p>-\$21.4 million</p> <p>✓</p>	<p>CEO Pay</p> <p>-38%</p> <p>✓</p>	<p>Financial Crimes</p> <p>-\$371.1 million</p> <p>✓</p>

Abortion Exposure (pro-choice)

-43%

Single Use Plastics Companies

-81%

✓

Prison Labor Involvement

-59%

✓

Air Pollution Minority Communities

-68%

✓

Product Safety Violations

-\$81.7 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 Verizon to use 50% renewable energy by 2025. Verizon is two-thirds of the way to its target as of 2020

[Report](#)



Environment



Parnassus pushes Microsoft to commit to being carbon negative by 2030

[Report](#)



Human Rights



Green Century pushed Home Depot to increase availability of natural pesticides to protect bee populations

[Website](#)



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



BlackRock pushes Boohoo group to improve board oversight of ESG risks

[Report](#)

Disclaimer

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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 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.

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 Moderate and Moderate 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 (77%) of your portfolio, and the portion (98%) 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
Toxic Water Pollution	Amount (weighted by toxicity) of toxic water pollution from facilities in the U.S. and European Union.	Government
Gun & Ammunition Exposure	Companies that produce or sell guns and ammunition.	SEC
Abortion Exposure (pro-choice)	Companies that manufacture and distribute medical abortion drugs or provide and support healthcare services that enable abortion.	SEC
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
Anti-Forced Labor Score	How well do food, communications, and apparel companies disclose and prevent forced labor in their supply chains.	NGO Watchdog
Data Privacy Violations	Penalties paid to the US government or UK government for abusing data privacy.	Government
Prison Labor Involvement	Does a company use or support prison labor, including supply chain.	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.	NGO Watchdog
Air Pollution Minority Communities	Amount that minority communities are exposed to toxic air pollution from industrial facilities in the U.S., using Census, and EPA data.	Academia
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
Financial Crimes	Penalties paid to the US government or UK government for insider trading, market manipulation, and improper securities sales.	Government
Product Safety Violations	Penalties paid to the US government or UK government for unsafe products.	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