

JULY 27, 2022

## Companies Changed

CATEGORY	#
Health	7
Environment	44
Human Rights	13
Equal Opportunity	268
Accountability	11



## Your Top Holdings

ESGYX	PFPWX
GCEUX	TSDJX
BAFWX	CRANX
ARAIX	IHI
NEXTX	CISIX

Metrics compared to the portfolio: Moderate Aggressive Composite Benchmark

Health	Environment	Human Rights	Equal Opportunity	Accountability
Tobacco Producer Exposure	Clean Energy Companies	Animal Exploitation	Money Bail Involvement	Political Transparency Voting Support
-100%	+134%	-6%	-100%	+78%
✓	✓	✓	✓	✓
Weapon Industry Exposure	Single Use Plastics Companies	Prison Labor Involvement	LGBTQ Discrimination Prohibited	Political Spending Disclosure Score
-70%	-45%	-22%	+7%	+5%
✓	✓	✓	✓	✓
Toxic Air Pollution	Fossil Fuel Industry Exposure	Digital Rights Ranking	Air Pollution Minority Communities	Bribery, Corruption, and Fraud Violations
-27%	-51%	+21%	-7%	-\$50.1 million
✓	✓	✓	✓	✓

<div>Toxic Water Pollution</div> <div>-89%</div> <div>✓</div>	<div>Deforestation Producers Exposure</div> <div>-57%</div> <div>✓</div>	<div>Uyghur Forced Labor Exposure</div> <div>+274%</div> <div></div>	<div>Board Racial/Ethnic Diversity</div> <div>-4%</div> <div></div>	<div>For Profit College Exposure</div> <div>+95%</div> <div></div>
<div>Abortion Exposure (pro-choice)</div> <div>+44%</div> <div>✓</div>	<div>Environmental Violations</div> <div>-\$98.9 million</div> <div>✓</div>	<div>Conflict Mineral Accountability</div> <div>+25%</div> <div>✓</div>	<div>Prison Operators</div> <div>-100%</div> <div>✓</div>	<div>Financial Crimes</div> <div>-\$36.9 million</div> <div>✓</div>

## 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 Agilent to pledge no layoffs 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 Aggressive** and **Moderate Aggressive Composite 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 Aggressive** have ties to animal testing and animal food products, compared to the portfolio selected for comparison (**Moderate Aggressive Composite 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 Aggressive** and **Moderate Aggressive Composite 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 (87%) 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

<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>Toxic Water Pollution</b>	Amount (weighted by toxicity) of toxic water pollution from facilities in the U.S. and European Union.	Government
<b>Abortion Exposure (pro-choice)</b>	Companies that manufacture and distribute medical abortion drugs or provide and support healthcare services that enable abortion.	SEC
<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>Fossil Fuel Industry Exposure</b>	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
<b>Deforestation Producers Exposure</b>	Agricultural commodity producers and traders linked to deforestation	NGO Watchdog
<b>Environmental Violations</b>	Penalties paid to the US government or UK government for harming the environment.	Government
<b>Animal Exploitation</b>	Is a company involved in animal testing, and/or food + clothing containing animal products.	NGO Watchdog
<b>Prison Labor Involvement</b>	Does a company use or support prison labor, including supply chain.	NGO Watchdog
<b>Digital Rights Ranking</b>	How well do internet and telecommunications companies protect customer privacy, security, and free expression.	NGO Watchdog
<b>Uyghur Forced Labor Exposure</b>	Companies tied to human rights abuses in Xinjiang, China.	Academia
<b>Conflict Mineral Accountability</b>	How well do companies address conflict mineral risk in their supply chains.	NGO Watchdog
<b>Money Bail Involvement</b>	Companies involved in money bail services.	NGO Watchdog
<b>LGBTQ Discrimination Prohibited</b>	Does a company prohibit discrimination on the basis of sexual orientation and gender identity.	NGO Watchdog
<b>Air Pollution Minority Communities</b>	Amount that minority communities are exposed to toxic air pollution from industrial facilities in the U.S., using Census, and EPA data.	Academia
<b>Board Racial/Ethnic Diversity</b>	Racial/ethnic diversity of board members.	NGO Watchdog
<b>Prison Operators</b>	Does a company operate or maintain private prisons.	NGO Watchdog
<b>Political Transparency Voting Support</b>	Percent of mutual fund proxy votes in support of increased political spending disclosure.	SEC
<b>Political Spending Disclosure Score</b>	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
For Profit College Exposure	Companies that manage for-profit colleges.	NGO Watchdog
Financial Crimes	Penalties paid to the US government or UK government for insider trading, market manipulation, and improper securities sales.	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