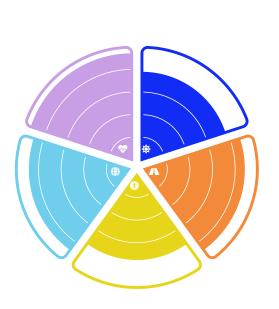
**IMPACT REPORT** ESG MODERATE AGGRESSIVE

JULY 27, 2022

💎 YourStake

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		

Common Interests

Metrics compared to the portfolio: Moderate Aggressive Composite Benchmark

<b>eee</b> Health	Environment	<b>(i)</b> Human Rights	<b>A</b> Equal Opportunity	Accountability
Tobacco Producer Exposure -100%	Clean Energy Companies +134%	Animal Exploitation	Money Bail Involvement	Political Transparency Voting Support +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
~	~	~	~	~



# Shareholder Advocacy

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## 🎨 Health

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

### 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

# A Equal Opportunity

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

### Report

## Accountability

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

### 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

# 🚯 Human Rights

Parnassus pushes Agilent to pledge no layoffs at the start of the COVID pandemic

Report

## A Equal Opportunity

BlackRock pushes technology company to reduce excessive executive pay

Report

## 🅸 Accountability

BlackRock pushes Boohoo group to improve board oversight of ESG risks

### Report

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### 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'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
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
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
Single Use Plastics Companies	Companies that produce plastic.	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
Environmental Violations	Penalties paid to the US government or UK government for harming the environment.	Government
Animal Exploitation	Is a company involved in animal testing, and/or food + clothing containing animal products.	NGO Watchdog
Prison Labor Involvement	Does a company use or support prison labor, including supply chain.	NGO Watchdog
Digital Rights Ranking	How well do internet and telecommunications companies protect customer privacy, security, and free expression.	NGO Watchdog
Uyghur Forced Labor Exposure	Companies tied to human rights abuses in Xinjiang, China.	Academia
Conflict Mineral Accountability	How well do companies address conflict mineral risk in their supply chains.	NGO Watchdog
Money Bail Involvement	Companies involved in money bail services.	NGO Watchdog
LGBTQ Discrimination Prohibited	Does a company prohibit discrimination on the basis of sexual orientation and gender identity.	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
Board Racial/Ethnic Diversity	Racial/ethnic diversity of board members.	NGO Watchdog
Prison Operators	Does a company operate or maintain private prisons.	NGO Watchdog
Political Transparency Voting Support	Percent of mutual fund proxy votes in support of increased political spending disclosure.	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
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