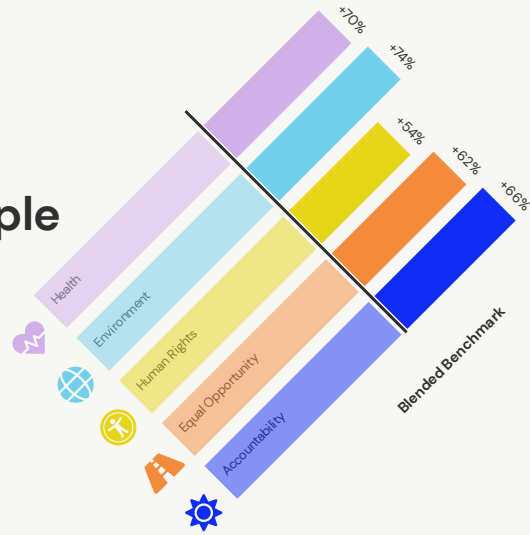




Impact Report

YourStake ESG SRI Sample



Report Highlights



79 percent less than benchmark in weapon industry exposure

Companies involved in the manufacture or sale of weapons.



93 percent less than benchmark in tobacco producer exposure

Companies involved in the production of tobacco.



\$ 85265 dollars less than benchmark in workplace health and safety violations

Penalties paid to the US Government for workplace health and safety failures.



68 percent less than benchmark in toxic air pollution

Harm done by toxic air pollution released in the U.S. by the company, using EPA data.



77 percent less than benchmark in fossil fuel industry exposure

Companies operating in the fossil fuel industry, and utilities powered by fossil fuels



57 percent greater than benchmark in clean energy companies

Companies with highest clean energy revenues.



75 percent less than benchmark in deforestation producers exposure

Agricultural commodity producers and traders linked to deforestation



4 percent less than benchmark in strong climate commitments

Companies with substantial climate pledges that include third-party accountability measures



7 percent less than benchmark in animal exploitation

Is a company involved in animal testing, and/or food + clothing containing animal products.



6 percent greater than benchmark in arbitration for sexual harassment prohibited

Has a company prohibited the use of arbitration for sexual harassment.



\$ 40.9 million dollars greater than benchmark in wage and hour violations

Penalties paid to the US Government for exploiting wage laborers.



8 percent less than benchmark in ethical recruitment score

How well do companies prevent restriction of worker movement and recruitment fees in their supply chains.



87 percent less than benchmark in prison industry exposure

Does a company have direct financial ties to the prison industry



1 percent less than benchmark in migrant detention involvement

Does a company have direct financial ties to US Migrant Detention Centers



11 percent greater than benchmark in women on boards

Percent of a company's board of directors filled by women.



\$ 5309 dollars less than benchmark in median worker pay

Salary of a company's median employee.



145 percent greater than benchmark in political transparency voting support

Percent of mutual fund proxy votes in support of increased political spending disclosure.



3 percent less than benchmark in political spending disclosure score

How transparent is a company around its political spending and lobbying frameworks and expenditures.



\$ 11.3 million dollars less than benchmark in bribery, corruption, and fraud violations

Penalties paid to the US Government for bribery, corruption, and fraud.



\$ 12.3 million dollars less than benchmark in product safety violations

Penalties paid to the US Government for unsafe products.

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 June 3, 2021, based on information available at that time and may change based on market or other conditions. Please consult with your advisor for more details about any of the metrics displayed in this report.

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Methodology

Benchmark comparison calculation methodology

Funds are benchmarked against a representative index based on their investment style (e.g. US Large Cap). Companies are benchmarked against the universe of companies with data coverage for that metric. The displayed comparisons are based on 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 the selected portfolio have ties to animal testing and animal food products, compared to their respective benchmarks. 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.

Overall Benchmark Comparison

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.

All metrics are ranked based on their performance relative to a benchmark. Fund benchmark comparisons are ranked against all other funds in our database, and company benchmark comparisons are ranked against all other companies in our database. These ranks are averaged by issue category. These averages are weighted by a factor representing the coverage of each metric within a portfolio. For portfolios that include funds, managers' shareholder engagement activities are included in the overall category comparisons.

Coverage

This report is based on the portion (98%) of your portfolio 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

Weapon Industry Exposure	Companies involved in the manufacture or sale of weapons.	NGO Watchdog
Tobacco Producer Exposure	Companies involved in the production of tobacco.	NGO Watchdog
Workplace Health and Safety Violations	Penalties paid to the US Government for 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
Fossil Fuel Industry Exposure	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
Clean Energy Companies	Companies with highest clean energy revenues.	NGO Watchdog
Deforestation Producers Exposure	Agricultural commodity producers and traders linked to deforestation	NGO Watchdog
Strong Climate Commitments	Companies with substantial climate pledges that include third-party accountability measures	NGO Watchdog
Animal Exploitation	Is a company involved in animal testing, and/or food + clothing containing animal products.	NGO Watchdog
Arbitration for Sexual Harassment Prohibited	Has a company prohibited the use of arbitration for sexual harassment.	NGO Watchdog
Wage and Hour Violations	Penalties paid to the US Government for exploiting wage laborers.	Government
Ethical Recruitment Score	How well do companies prevent restriction of worker movement and recruitment fees in their supply chains.	NGO Watchdog

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
Women on Boards	Percent of a company's board of directors filled by women.	NGO Watchdog
Median Worker Pay	Salary of a company's median employee.	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 for bribery, corruption, and fraud.	Government
Product Safety Violations	Penalties paid to the US Government for unsafe products.	Government