

AUGUST 19, 2021

Companies Changed

CATEGORY	#
Health	1
Environment	16
Human Rights	2
Equal Opportunity	227
Accountability	3



Your Top Holdings

ESGU	ESGD
RESP	XSOE
USXF	ESML
RESO	DMXF
SUSA	NUSC

Health

Environment

Human Rights

Equal Opportunity

Accountability

Tobacco Producer Exposure

-96%

✓

Clean Energy Companies

+51%

✓

Animal Exploitation

-1%

✓

Prison Industry Exposure

-34%

✓

Political Transparency Voting Support

-18%

Weapon Industry Exposure

-57%

✓

Deforestation Producers Exposure

-10%

✓

Arbitration for Sexual Harassment Prohibited

+6%

✓

Migrant Detention Involvement

-29%

✓

Political Spending Disclosure Score

+3%

✓

Workplace Health and Safety Violations

-\$49819

✓

Fossil Fuel Industry Exposure

-47%

✓

Wage and Hour Violations

-\$1.5 million

✓

Women on Boards

+3%

✓

Bribery, Corruption, and Fraud Violations

-\$29.8 million

✓

Toxic Water Pollution

-33%

✓

Strong Climate Commitments

+17%

✓

Ethical Recruitment Score

-9%

CEO Pay



-8%

✓

Product Safety Violations



+\$636511

Shareholder Advocacy

 **Health** 



BlackRock engages 2 drug retailers to update reporting on governance in opioid-related risks, 1 makes change

[Report](#)

 **Environment** 



BlackRock pushes Verizon Wireless to commit to carbon neutrality by 2035

[Report](#)

 **Environment** 

Nuveen pushes two companies to commit to sustainability and emissions targets

[Report](#)

 **Human Rights** 


BlackRock pushes automobile company to cancel contract with company violating human rights

[Report](#)

 **Human Rights** 



BlackRock pushes Top Glove to reduce forced labor issues

[Report](#)

 **Equal Opportunity** 



BlackRock pushes technology company to reduce excessive executive pay

[Report](#)

 **Equal Opportunity** 



Nuveen pushes 150 companies to add female board members across Japan and the USA

[Report](#)

 **Accountability** 

Nuveen pushes a company to disclose ESG factors in proxy statement or report

[Report](#)

 **Accountability** 

BlackRock pushes one company to improve executive compensation alignment with long-term goals

[Report](#)

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Methodology

✓ Metrics marked with a check are better than the benchmark.

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.

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.

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 (99%) 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

Tobacco Producer Exposure	Companies involved in the production of tobacco.	NGO Watchdog
Weapon Industry Exposure	Companies involved in the manufacture or sale of weapons.	NGO Watchdog
Workplace Health and Safety Violations	Penalties paid to the US Government for workplace health and safety failures.	Government
Toxic Water Pollution	Amount (weighted by toxicity) of toxic water pollution from facilities in the U.S. and European Union.	Government
Clean Energy Companies	Companies with the highest clean economy revenues, and pure-play clean energy companies.	SEC
Deforestation Producers Exposure	Agricultural commodity producers and traders linked to deforestation	NGO Watchdog
Fossil Fuel Industry Exposure	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	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
CEO Pay	Ratio of CEO pay to median worker pay	SEC
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
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