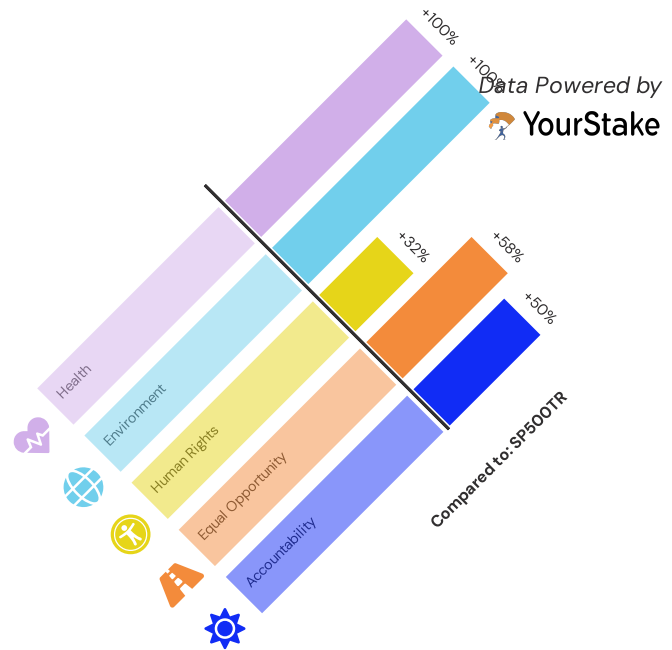




Impact Report STNC 12.31.23



Report Highlights



100 percent less than benchmark in tobacco producer exposure

Companies that produce cigarettes or tobacco products.



100 percent less than benchmark in fossil fuel industry exposure

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



33 percent less than benchmark in animal testing

Companies involved in animal testing.



60 percent less than benchmark in ceo pay

Ratio of CEO pay to median worker pay.



\$ 87.6 million dollars less than benchmark in bribery, corruption, and fraud violations

Penalties paid to the US government or UK government for bribery, corruption, and fraud.

Disclaimer

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We define countries as the entities that exercise or have previously exercised sovereign authority over autonomous regions. We do not mean to make any claims regarding the political status of such autonomous regions, and recognize the political status of some territories may be in dispute. Country-based metrics are applied to securities we believe have been issued by country-controlled entities, such as the United States Department of the Treasury. We determine entities controlled by countries based upon available data sources, but make no warranty or guarantee that such attribution is accurate or complete for all entities in our database.

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Methodology

Comparison calculation methodology

This report compares two selected portfolios: **STNC 12.31.23** and **SP500TR**. 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 **STNC 12.31.23** have ties to animal testing and animal food products, compared to the portfolio selected for comparison (**SP500TR**). 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.

The overall comparison is a coverage-weighted average of the comparison between the two portfolios, **STNC 12.31.23** and **SP500TR**, 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 (100%) of your portfolio, and the portion (100%) 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

Tobacco Producer Exposure	Companies that produce cigarettes or tobacco products.	SEC
Fossil Fuel Industry Exposure	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
Animal Testing	Companies involved in animal testing.	NGO Watchdog
CEO Pay	Ratio of CEO pay to median worker pay.	NGO Watchdog
Bribery, Corruption, and Fraud Violations	Penalties paid to the US government or UK government for bribery, corruption, and fraud.	Government

