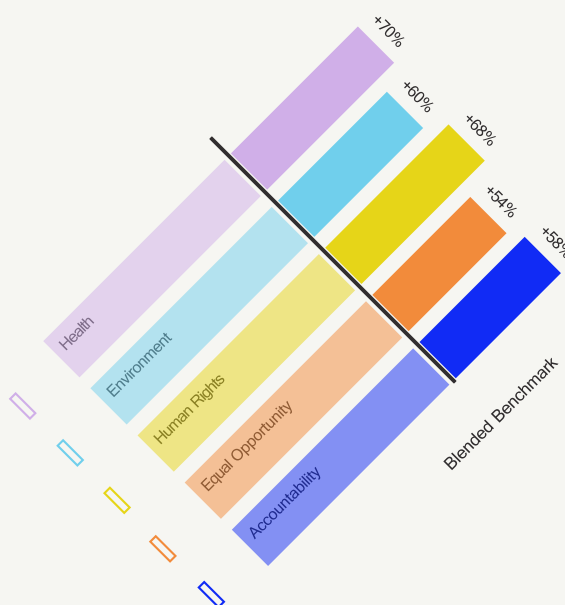


Impact Report B&D SRI Growth Portfolio

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Report Highlights

- 100 percent less than benchmark in tobacco producer exposure

Companies involved in the production of tobacco.
- 53 percent less than benchmark in toxic air hazard

Harm done by toxic air pollution released in the U.S. by the company, using EPA data.
- 43 percent less than benchmark in toxic water pollution

Amount (weighted by toxicity) of toxic water pollution from facilities in the U.S. and European Union.
- 31 percent less than benchmark in military weapons exposure

Companies involved in the manufacture or sale of military weapons and major military contractors.
- 19 percent less than benchmark in gun & ammunition exposure

Companies that produce or sell guns and ammunition.

- **7 percent greater than benchmark in access to nutrition score**

How well do food & beverage companies provide access to nutritious products.

- **27 percent greater than benchmark in clean energy companies**

Companies with the highest clean economy revenues, and pure-play clean energy companies.

- **40 percent less than benchmark in fossil fuel industry exposure**

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

- **31 percent less than benchmark in nuclear power exposure (pro-nuclear)**

Companies in the nuclear sector.

- **31 percent less than benchmark in nuclear power exposure (anti-nuclear)**

Companies in the nuclear sector.

- **49 percent less than benchmark in single use plastics companies**

Companies that produce plastic.

- **58 percent less than benchmark in country welfare and equality**

Exposure to sovereign debt from countries that have severe welfare and equality violations.

- **19 percent greater than benchmark in digital rights freedom of expression score**

How well do internet and telecommunications companies protect free expression and limit censorship.

- **16 percent greater than benchmark in digital rights governance score**

How strong are internet and telecommunications companies' internal structures for protecting customer privacy and security.

- **5 percent greater than benchmark in women on boards**

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

- **2 percent greater than benchmark in lgbtq+ equality score**

How well do companies publicly support, provide health benefits to, and create inclusive environments for the LGBTQ+ community.

- **53 percent less than benchmark in 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.

- **18 percent greater than benchmark in board racial/ethnic diversity**

Racial/ethnic diversity of board members.

- **33 percent less than benchmark in prison labor involvement**

Does a company use or support prison labor, including supply chain.

- **\$ 103.9 million dollars less than benchmark in bribery, corruption, and fraud violations (us + uk)**

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

- **\$ 15.6 million dollars less than benchmark in financial crimes (us + uk)**

Penalties paid to the US government or UK government for insider trading, market manipulation, and improper securities sales.

- 25 percent less than benchmark in chinese company exposure
Chinese public companies.

Your Impact

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 YourStake



If you invest \$1M in your portfolio over 10 years, you may be responsible for the equivalent of approximately:

4 more homes powered by clean energy

compared to the total U.S. stock market based on amount of equivalent clean energy (mwh) produced by a company based on revenue supporting a clean energy economy.



8 more jobs supported

compared to the total U.S. stock market based on the number of jobs supported by a company.



73 more meetings led by women

compared to the total U.S. stock market based on number of women in management positions.



1,524 fewer showers worth of water

compared to the total U.S. stock market based on the amount of water used.



88 more solar panels

compared to the total U.S. stock market based on amount of equivalent clean energy (mwh) produced by a company based on revenue supporting a clean energy economy.



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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 November 5, 2025, and may change over time based on market or other conditions. The holdings of B&D SRI Growth Portfolio are as of March 19, 2025. Please consult with your advisor for more details about any of the metrics displayed in this report.

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.

Investing involves risk. Depending on the types of investments, there may be varying degrees of risk. Socially responsible investing does not guarantee any amount of success. This analysis may not provide a complete picture of the portfolio values alignment as it is only as reliable as the amount of data available.

Links to external websites are strictly as a courtesy. We make no representation as to the completeness or accuracy of information provided in the web links within this report. Nor is Stake liable for any direct or indirect technical or system issues or any consequences arising out of your access to or your use of third-party technologies, web sites, information and programs made available through this report. When you access one of these links, you assume total responsibility and risk for your use of the web sites.

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.

The overall comparison is a coverage-weighted average of the comparison between the portfolio and the 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 (88%) 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 metrics for this portfolio. If no metrics 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
Toxic Air Hazard	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
Military Weapons Exposure	Companies involved in the manufacture or sale of military weapons and major military contractors.	NGO Watchdog

Gun & Ammunition Exposure	Companies that produce or sell guns and ammunition.	SEC
Access To Nutrition Score	How well do food & beverage companies provide access to nutritious products.	NGO Watchdog
Clean Energy Companies	Companies with the highest clean economy revenues, and pure-play clean energy companies.	SEC
Fossil Fuel Industry Exposure	Companies operating in the fossil fuel industry, and utilities powered by fossil fuels	NGO Watchdog
Nuclear Power Exposure (pro-nuclear)	Companies in the nuclear sector.	SEC
Nuclear Power Exposure (anti-nuclear)	Companies in the nuclear sector.	SEC
Single Use Plastics Companies	Companies that produce plastic.	SEC
Country Welfare and Equality	Exposure to sovereign debt from countries that have severe welfare and equality violations.	Government
Digital Rights Freedom of Expression Score	How well do internet and telecommunications companies protect free expression and limit censorship.	NGO Watchdog
Digital Rights Governance Score	How strong are internet and telecommunications companies' internal structures for protecting customer privacy and security.	NGO Watchdog
Women on Boards	Percent of a company's board of directors filled by women.	NGO Watchdog
LGBTQ+ Equality Score	How well do companies publicly support, provide health benefits to, and create inclusive environments for the LGBTQ+ community.	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 Labor Involvement	Does a company use or support prison labor, including supply chain.	NGO Watchdog
Bribery, Corruption, and Fraud Violations (US + UK)	Penalties paid to the US government or UK government for bribery, corruption, and fraud.	Government
Financial Crimes (US + UK)	Penalties paid to the US government or UK government for insider trading, market manipulation, and improper securities sales.	Government
Chinese Company Exposure	Chinese public companies.	SEC