

# US VEGAN CLIMATE INDEX



## Investing for Humanity

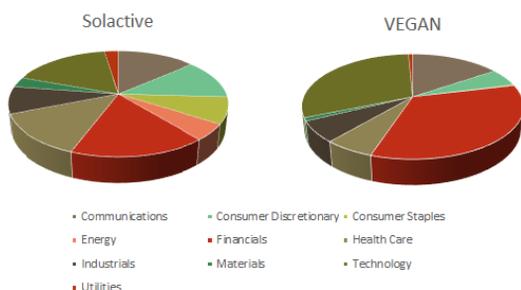
The US Vegan Climate Index (VEGAN), developed by Beyond Advisors, part of the Beyond Investing vegan platform, is a passive, rules-based index of U.S. mainly large cap stocks, screened according to vegan and climate-conscious principles.

VEGAN excludes companies engaged in animal exploitation, defense, human rights abuses, fossil fuels extraction and energy production, and other environmentally damaging activities.

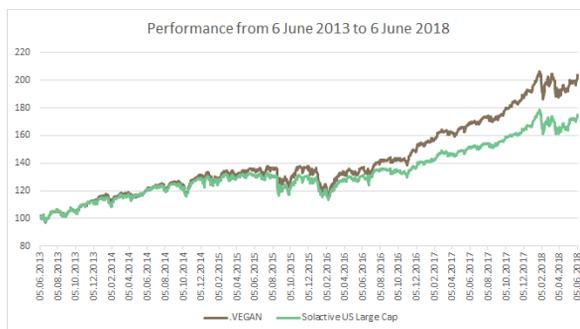
VEGAN has been created to demonstrate that it is possible to achieve broad based US market exposure while conforming to vegan and environmentally-conscious principles.

Ticker	<b>.VEGAN</b>
Inception date	<b>6 June 2018</b>
Benchmark	<b>Solactive US Large Cap Solactive AG</b>
Calculation agent	<b>Solactive AG</b>
Number of stocks	<b>300</b>
Average market cap	<b>\$255bn</b>
Beta	<b>1.11</b>
Tracking error	<b>1.85%</b>
Excess return (5 years)	<b>3.44% p.a.</b>

## Sector comparison



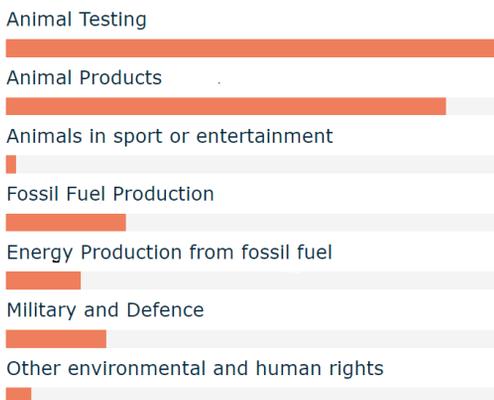
## Pro Forma Performance



## Top 10 Holdings

Apple Inc	4.25%
Microsoft Inc	4.15%
Alphabet Inc	4.04%
Facebook Inc	3.30%
JP Morgan Chase & Co	2.96%
Intel Corp	2.60%
Bank of American Corp	2.57%
Visa Inc	2.56%
Wells Fargo & Co	2.48%
AT&T	2.46%

## Breakdown of exclusions



## Return statistics

	.VEGAN	Solactive US Large Cap
Drawdown	-15.75%	-14.47%
Total Return	103.83%	75.14%
Return p.a.	15.29%	11.85%
Volatility p.a.	13.35%	12.27%
Sharpe Ratio	114.53%	96.51%

Return YoY	.VEGAN	Solactive US Large Cap
2013	16.51%	15.12%
2014	12.72%	11.37%
2015	1.92%	-0.50%
2016	13.68%	9.13%
2017	25.72%	19.59%
2018	6.55%	5.21%

Holdings subject to change, total exclusions approx. 41% by market cap of Solactive US Large Cap All Risk and Return figures quoted on Price Return basis.

Pro Forma Performance calculated over the period: 6 June 2013 – 6 June 2018

## Beyond Advisors

The founders and partners of Beyond Advisors are experienced investment professionals, leading a vegan lifestyle, who have developed the index guidelines according to vegan and environmentally-friendly principles.

100% aligned  
Ethically-driven  
Financially skilled  
Highly experienced



[www.beyondfundadvisors.com](http://www.beyondfundadvisors.com)



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@beyondinvesting

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## VEGAN INDEX IMPACT METRICS

	VEGAN	Benchmark	Based on company reported
Carbon efficiency	0.08	0.21	tons of GHG (Scope 1 & 2) emissions per unit revenue
Waste efficiency	0.07	0.33	tons of waste generated per unit revenue
Water efficiency	2.73	10.11	litres fresh water used per unit revenue
Environmental good	12.60%	8.20%	portfolio allocated to environmental solutions
Avoiding environmental harm	0.00%	4.20%	portfolio allocated to environmentally destructive companies
Avoiding social harm	0.50%	5.90%	portfolio allocated to companies aggravating social issues

## INVESTMENT EQUIVALENTS

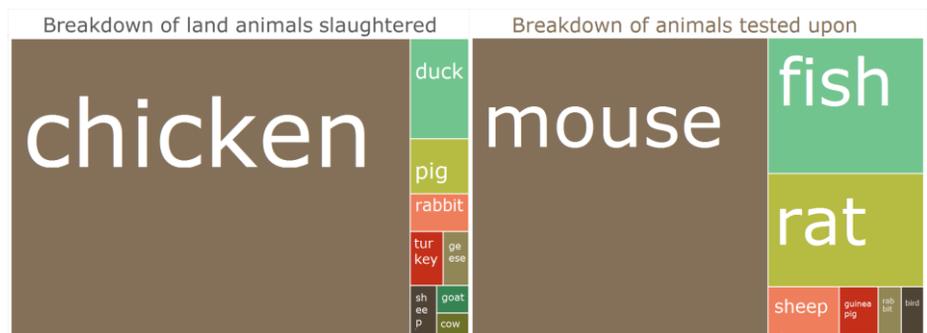
In real terms compared to the Benchmark for every \$1,000 investment in VEGAN			Related SDGs
Carbon efficiency	130	less tons of GHG emissions	7, 13
Waste efficiency	260	less tons of waste generated	6, 12, 14, 15
Water efficiency	7400	less litres fresh water used	6
Environmental good	4.4%	more invested contributing to environmental solutions	most SDGs
Avoiding environmental harm	4.2%	less invested in aggravating environmental problems	most SDGs
Avoiding social harm	5.3%	less invested in aggravating social issues	most SDGs

Impact data courtesy of Impact Cubed IC, [www.impact-cubed.com](http://www.impact-cubed.com)

## Animal Impact

**13 animals saved per \$1,000 of VEGAN**

Land animals killed: 18 billion  
 Fish caught and farmed: 34 billion  
 Egg laying hens: 1.6 billion  
 Dairy cows: 64 million  
 Animals used for testing: 28 million



USA proportion of global annual figures from National Center for Biotechnology Information, GreenFacts, FAOstat



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