

PMC Sustainable ETF Portfolios

**A holistic portfolio solution for investors
seeking a dedicated ESG strategy**



Envestnet | PMC – Leaders in Sustainable Investing

Platform assets:
\$33B

PMC assets:
\$350M

Number of advisors:
32K

AUM growth YOY:
128%

Data as of 6/30/21.

Leverage Envestnet | PMC's Experience

Envestnet provides experience across five key areas of sustainable investing:



Research

Rigorous and disciplined due diligence uncovers impact managers



Overlay

Application of impact screens to client portfolios



Portfolio solutions

Portfolios built on forward-looking capital markets assumptions and asset allocation methodology



Reporting

Innovative quarterly reports describe a strategy's quantitative and qualitative performance



Practice management

Thought leadership and educational resources

Advisors should always conduct their own research and due diligence on investment products and the product managers prior to offering or making a recommendation to a client.

What Is Sustainable Investing?

Our perspective is that sustainable investing pursues two goals:

1

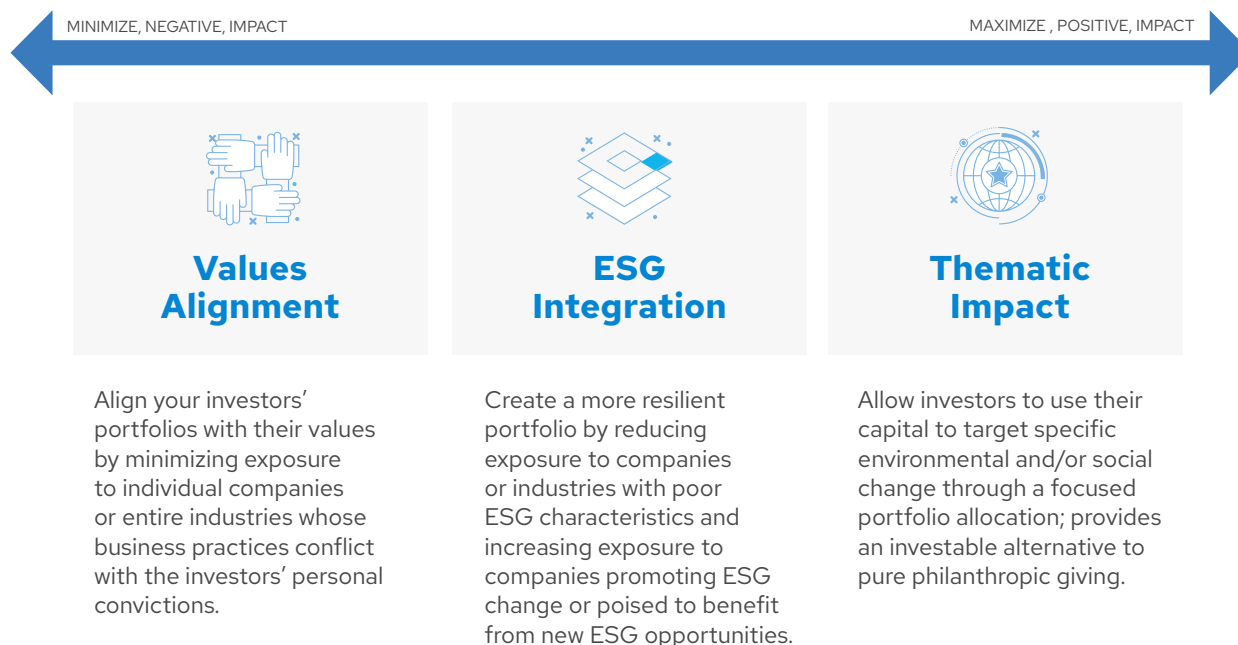
Protecting and **enhancing long-term value** by addressing environmental or social risks – or by investing in solutions to environmental or social challenges.

2

Protecting, enhancing, or otherwise **positively impacting the long-term health of the environment or society** through expressing environmental or social values.

Approaches To Sustainable Investing

We provide sustainable investing strategies to enable each advisor to build portfolios specific to his or her individual client's values and interests.



A Data-Driven Approach to ESG ETF Investing

Selecting strategies across multiple asset classes

ESG integration in passive investing has grown dramatically in recent years, driven by the rise of both indexing and ETFs that provide cost and tax benefits, daily liquidity, and transparency, combined with growing investor interest in ESG and sustainability. With all of this growth, investors have more ESG ETF options to choose from.

Vetting ESG approaches – Envestnet | PMC's ESG due diligence framework

We're closely monitoring these aspects of ESG integration in passive investing. Over the last few years, we've built out a process to conduct ESG due diligence in a systematic way through a quantitative approach.

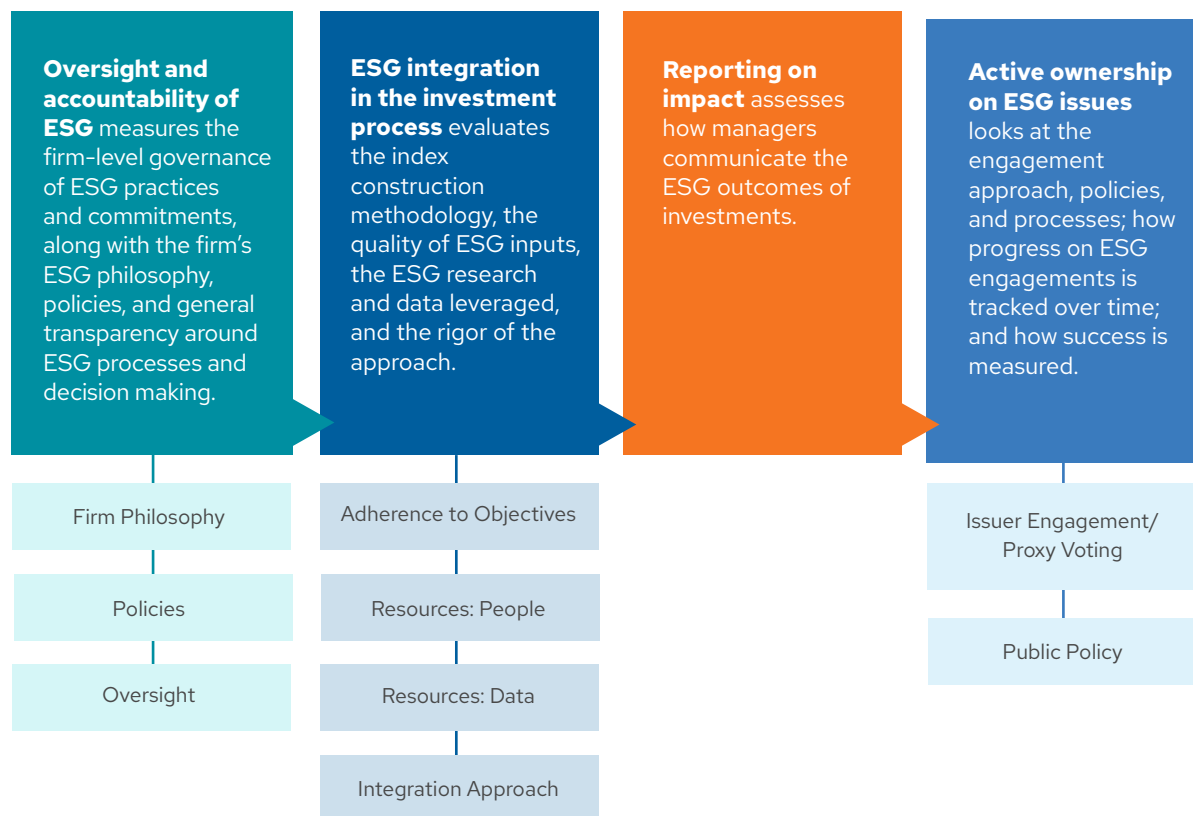


For more information, go to investpmc.com.

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Envestnet | PMC's Due Diligence Process



Leveraging our robust ESG due diligence framework, we identify investment strategies with unique and dedicated approaches to ESG integration. The models utilize a multi-manager set of ESG ETFs, which incorporate ESG issues that expand across a multitude of factors, from greenhouse gas emissions to labor rights. As new ESG-focused strategies gain traction in the market, we are committed to monitoring the expanding landscape by identifying asset managers with innovative approaches to ESG integration.

"ESG" in the name of an ETF can mean many different things. We are here to support you in identifying managers that are meaningfully integrating ESG information in unique and compelling ways in the pursuit of better outcomes.



For more information, go to investpmc.com.

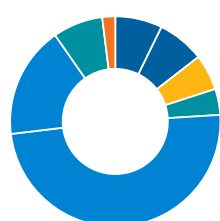
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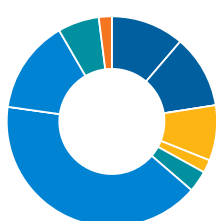
ESG Integrated Portfolios Built to Help Meet Your Investment Goals

Long gone are the days when “socially responsible” investing meant giving up performance. Today, focusing on positive social and environmental outcomes can actually enhance investment performance. ESG integration is an investment philosophy that focuses on measurable, industry-specific ESG factors that often help create more resilient portfolios. This is done by mitigating intangible risks and driving long-term performance by identifying and investing in long-term demographic and economic shifts.

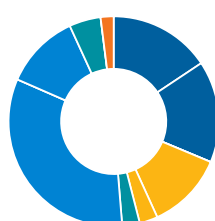
Portfolio Allocations



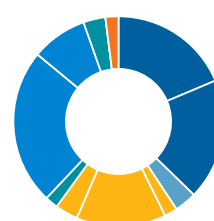
Capital Preservation



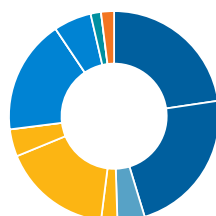
Conservative



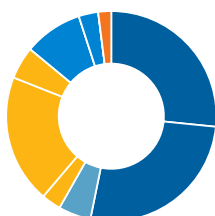
Conservative Growth



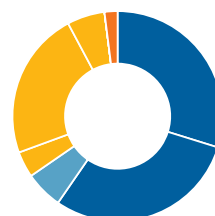
Moderate



Moderate Growth



Growth



Aggressive

| Portfolio Allocations | | Large-Cap Core | Large-Cap Core | Small-Cap Core | Global Equity | Int'l Developed Mkts | Int'l Emerging Mkts | High Yield | Intermediate Bond | Int'l Bond | Short Bond |
|-----------------------|--|--|-------------------------------------|--------------------------|--|--|---------------------------------|--|---|-------------------------------|---|
| | | CHGX | JUST | NUSC | ESGG | NUDM | NUEM | HYFX | EUSB | BGRN | SUSB |
| | | Change Finance US Large Cap Fossil Fuel Free ETF | Goldman Sachs JUST US Large Cap ETF | Nuveen ESG Small-Cap ETF | FlexShares STOXX Global ESG Impact ETF | Nuveen ESG Int'l Developed Markets ETF | Nuveen ESG Emerging Markets ETF | iShares ESG Advanced High Yield Corporate Bond ETF | iShares ESG Advanced Total US Bond Market ETF | iShares Global Green Bond ETF | iShares ESG 1-5 Year Corporate Bond ETF |
| Capital Preservation | | 7.25% | 7.25% | - | - | 5.50% | - | 4.00% | 49.10% | 17.20% | 7.70% |
| Conservative | | 11.25% | 11.25% | - | - | 8.50% | 2.00% | 3.30% | 40.85% | 14.40% | 6.35% |
| Conservative Growth | | 15.65% | 15.65% | - | - | 11.90% | 2.80% | 2.70% | 32.85% | 11.60% | 4.85% |
| Moderate | | 18.65% | 18.65% | 3.40% | 2.00% | 13.80% | 3.50% | 2.00% | 24.00% | 8.60% | 3.40% |
| Moderate Growth | | 22.65% | 22.65% | 4.20% | 2.50% | 16.80% | 4.20% | - | 17.60% | 5.80% | 1.60% |
| Growth | | 26.60% | 26.60% | 5.00% | 3.00% | 19.80% | 5.00% | - | 9.00% | 3.00% | - |
| Aggressive | | 29.80% | 29.80% | 5.80% | 4.00% | 22.80% | 5.80% | - | - | - | - |



Talk to a Consultant About How to Get Started

Contact us at impact@envestnet.com to learn more about PMC Sustainable ETF Portfolios or visit envestnet.com/impact.



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Investments in smaller companies carry greater risk than is customarily associated with larger companies for various reasons such as volatility of earnings and prospects, higher failure rates, and limited markets, product lines or financial resources. Investing overseas involves special risks, including the volatility of currency exchange rates and, in some cases, limited geographic focus, political and economic instability, and relatively illiquid markets. Income (bond) funds are subject to interest rate risk which is the risk that debt securities in a fund's portfolio will decline in value because of increases in market interest rates.

An investment in these portfolios is subject to market risk and an investor may experience loss of principal. The recent growth rate in the stock market has helped to produce short-term returns that are not typical and may not continue in the future. Returns are presented without provision for federal or state taxes. Under no circumstances does the information contained within represent a recommendation to buy or sell securities. This is not a sales solicitation, but rather a research profile on a specific investment option.

ESG and impact focused strategies are identified with the support of third-party research. Certain asset classes may not have an ESG or impact focused strategy that goes through our ESG due diligence standards. In this case, the portfolios will generally utilize alternative strategies that have been vetted by the PMC Research Team. Funds that incorporate ESG characteristics into the investment process may limit their exposure to certain types of investments. As a result, an investment in an ESG focused fund may be less diversified relative to funds with similar strategies that do not have an ESG focus.

The portfolios incorporate the impact and/or ESG criteria on a best-efforts basis. PMC utilizes several ESG research and ratings providers for portfolio management and reporting purposes. All ESG data, including impact scores, are believed to be from reliable sources; however, we make no representation as to its accuracy or completeness. The scores, ratings, and assessments are subjective by nature, and may or may not be accurate, complete, or reflect the beliefs of some investors.

Past performance is not indicative of future results.

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