

Gradient Socially Responsible Portfolio

Align your portfolio with your values

The information herein is for informational purposes only and should not be used as the sole basis for making an investment decision. Investing involves risk including the potential loss of principal. Please consult your independent investment advisor before making any investment decisions.



Investment Philosophy

OBJECTIVE

Socially Conscious
Investing

MANDATE

Risk Managed
Exposure to
Socially
Responsible
Investing

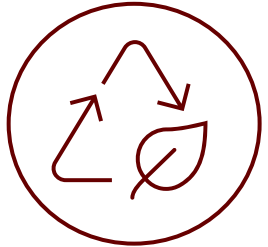
EXECUTION

Actively Managed
ETF Selection

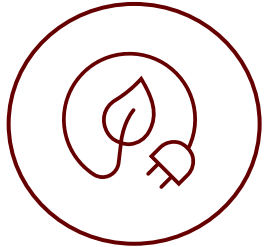
Socially Responsible Investing



Equality in the Workplace



Environmentally Conscious



Cleantech / Renewable Energy

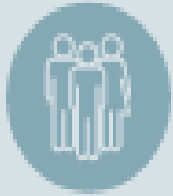


Positive Corporate Governance Initiatives

Socially Responsible Investing



SOCIALLY RESPONSIBLE INVESTING IS A SECULAR GROWTH STORY



Demographic change

A new generation of savers wants to invest how they live – sustainably. And their pool of assets continues to go up.*



Environmental impact

Risks associated with poor stewardship have the potential to undermine business success.



Resource scarcity

Resources need to be managed efficiently and thoughtfully as the world population increases.



Changing expectations

ESG factors are now being integrated into everyday business practice.



Social media awareness

Companies have become more sensitive to potential negative headline and reputation risk.

*Sources: Hoops, Thomas. "Why it's time to believe the hype behind ESG investing." InvestmentNews. April, 2015.

*Sustainable signals: The individual investor perspective." Morgan Stanley Institute for Sustainable Investing. February, 2015.
ESG Clarity survey. Allianz Global Investors/GfK. July, 2017.



**SOCIALLY
RESPONSIBLE**

Investing In Social Strategies

INVESTING THAT ALIGNS WITH SOCIALLY RESPONSIBLE INITIATIVES

CAPITAL FLOWS TO INVESTMENTS THAT PROMOTE SOCIAL GOOD

SOCIALLY RESPONSIBLE STRATEGIES HAVE GROWN RAPIDLY OVER THE PAST DECADE

CAN BE DESIGNED TO ACHIEVE YOUR OBJECTIVES IN ACCORDANCE WITH YOUR RISK TOLERANCE

CAN BE DIVERSIFIED ACROSS ASSET CLASS, GEOGRAPHY AND SECTOR

Socially Responsible Portfolio

COMPOSITE PERFORMANCE THROUGH AUGUST 31, 2026

	YTD 2026	1 Year	3 Year	5 Year	10 Year	Annualized Return Since Inception*	Standard Deviation Since Inception*
Socially Responsible	15.12%	22.31%	19.53%	10.65%	14.44%	14.44%	15.76%

*Socially Responsible inception date is 9/1/16. Performance returns and standard deviation are composite of all accounts included in the respective portfolios. Returns are net of all transaction costs and net of Gradient Investment's management fee but does not include the standard 1.00% advisor fee. These numbers are not meant to predict your individual results which could be better or worse. Investor's net returns may vary based on advisory fee, account size, and householding. Investing involves risk including the possible loss of principal and past performance is no guarantee of future returns.



SUMMARY

Gradient Socially Responsible

- **Socially Responsible Investing Aligns Portfolios With Environmental, Social and Governance Initiatives.**
 - Workplace equality
 - Environmentally conscious
 - Cleantech / Renewable Energy
 - Positive corporate governance initiatives
- **The Gradient Socially Responsible Portfolio**
 - in accordance with your return objectives and risk tolerance
 - Provides a diversified approach utilizing exchange traded funds (ETFs)
 - Asset allocation

Account Minimum: \$500

Gradient Investments, LLC (GI) is a third-party money manager offering fee-only investment management through independent Registered Investment Advisory firms. For more information, please visit us at www.gradientinvestments.com or request a copy of Gradient Investments' ADV Part 2A. Please consult your independent investment advisor or GI regarding your specific goals and objectives before investing.

