

IWP Capital Business Involvement Screening Research

IWP Capital's Business Involvement Screening Research is a screening service that enables investors to faithfully and efficiently create portfolios in line with Catholic values.

Advisors, portfolio managers, and asset owners can access IWP Capital's research online via Sanctify, our flagship desktop portal and mobile app, or through a data feed directly.

Key Features

FFV Scorecard®:

IWP Capital's Faith & Family Values (FFV) Scorecard® is a turnkey set of 21 exclusionary screens that represents our best in thought approach to Catholic values investing.

Global Coverage:

IWP Capital's Business Involvement Screening Research spans 12,000 equity issuers, private companies, corporate bond issuers, and bond-issuing subsidiaries for involvement in 21 screening areas, such as abortion, contraceptives, and human embryonic stem cell usage. Our broad coverage ensures investors have the information they need to create faith-based portfolios.

Minimize Risk:

IWP Capital's Business Involvement Screening Research enables investors to identify opportunities that align with their values and avoid the ones that don't. This service prevents unwanted exposure to activities that conflict with investor priorities.

Experienced, Mission-Driven Team:

IWP Capital's team brings to the table over 60 years of combined experience across portfolio management, financial planning, investment research, data collection, and Catholic theology. We have pioneered the field of Catholic values investing and continue to shape its discourse.



Product Overview

IWP Capital's Business Involvement Research supports the integration of Catholic values into portfolio management. Our research is available via Sanctify, IWP Capital's proprietary web portal and mobile app.

IWP Capital's Business Involvement Research is used for:

- Portfolio screening for ethical, moral, and other relevant environmental, social, governance (ESG) criteria
- Portfolio screening for instances of controversy
- Due diligence reporting for corporate donors & suppliers
- Corporate engagement campaigns

"Economic decisions have human consequences and moral content; they help or hurt people, strengthen or weaken family life, advance or diminish the quality of justice in our land."

*-Economic Justice For All
USCCB, 1986*



Example Screens

- **Abortion:** IWP Capital's Abortion screen identifies companies, acute care facilities, and surgical centers that provide abortion services, produce abortifacients, or remain involved in any service that results in the termination of a human pregnancy.
- **Controversial Weapons:** IWP Capital's Controversial Weapons screen highlights companies involved in the production of anti-personnel landmines, biological and chemical weapons, cluster munitions, depleted uranium, nuclear weapons, their inputs, and specialized vehicles of delivery.
- **Euthanasia & Physician Assisted Suicide:** IWP Capital's Euthanasia & Physician Assisted Suicide screen examines companies involved in the production of devices or substances intended for use in euthanasia or physician assisted suicide.
- **Human Embryonic Stem Cells and Fetal Tissue:** IWP Capital's Human Embryonic Stem Cells (HESCs) and Fetal Tissue screen identifies companies that utilize HESCs or fetal tissue in their research & development process.

FFV Scorecard®

IWP Capital's Faith & Family Values (FFV) Scorecard® is a turnkey set of 21 exclusionary screens that represents our best in thought approach to Catholic values investing. The FFV Scorecard® incorporates the spirit of the USCCB Socially Responsible Investing Guidelines, Church doctrine, encyclicals, and other Catholic teachings to monitor company involvement in the following activities:

 <p>PROTECTING HUMAN LIFE</p>	 <p>PROMOTING HUMAN DIGNITY</p>	 <p>ENHANCING THE COMMON GOOD</p>	 <p>PURSuing ECONOMIC JUSTICE</p>	 <p>SAVING OUR GLOBAL COMMON HOME</p>
<ul style="list-style-type: none"> • Abortion • Artificial Reproduction • Euthanasia & Physician Assisted Suicide • Human Cloning • Human Embryonic Stem Cells & Fetal Tissue 	<ul style="list-style-type: none"> • Adult Entertainment • Contraceptives • Private Prisons • Sex Reassignment Treatments 	<ul style="list-style-type: none"> • Cannabis • Civilian Firearms • Controversial Weapons • E-Cigarettes • Gambling • Opioids • Tobacco 	<ul style="list-style-type: none"> • Predatory Lending • Third-Party Debt Collection 	<ul style="list-style-type: none"> • Coal Mining • Water Privatization • Whaling

473

Clients promoting the
common good of all

\$2,790,384,754

in assets screened in 2022



IWP Capital

IWP Capital provides Catholic values research and proxy voting services to faith-based investors. Our clients include Catholic dioceses, parishes, educational institutions, healthcare providers, charities, foundations, and high net worth individuals.

To learn more, please visit www.iwpcapital.com.

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