

Going Above and Beyond

As leading and pioneering providers of vegan and environmentally friendly investment solutions, we want to showcase Beyond Investing's work. Here we learn more about its success as it wins Most Innovative Large Cap Equity Fund 2022: US Vegan Climate ETF & Most Pioneering Sustainable Investment Platform 2022.

Simply put, Beyond Investing seeks to avoid all animal exploitation in its portfolios and will not invest in companies deemed to have a significant negative environmental impact. Growth is driven by the rising tide of ESG and SF awareness, and the vital need for investment to reflect the aims of the UN SDGs. Our core mission is to play a role in shaping a kinder, cleaner, healthier world.

Beyond Investing is a US-based registered investment adviser formed in 2017, by a group of seasoned investment professionals, to promote vegan investment products for the masses.

Beyond Investing was formed by vegan entrepreneur, impact investor, and Chief Executive Officer, Claire Smith; Chief Investment Officer and Chartered Financial Analyst, Larry Abele; and OBE, Head of Ethical Screening, and veteran in ethical investment, research, and financial services, Lee Coates.

Claire tells us, "Our USP is our strong ethical stance, backed by our founders' deep sector experience. In a crowded market, we stand out as a company which ensures investments are made ethically, whilst proving that ethics and business can and do mix. We have brought integrity and honesty to investment. People appreciate that, and understand our approach."

It has created the first ever publicly available vegan and environmentally conscious investment products and is the creator of the US Vegan Climate Index®, launched in June 2018 – independently calculated by Solactive. It is also the name behind the Europe Vegan Climate Index, the International Vegan Climate Index, the Global Vegan Climate Index, and the Vegan World Index®.

All of the Vegan Climate Indexes are passive, rules-based indices of large- and mid-cap stocks, screened according to vegan and climate-conscious principles. The Vegan World Index®, in contrast to the Vegan Climate Indexes, includes all eligible stocks after application of its screening

policies. It first applies these screens and then proactively selects companies whose activities contribute the most towards the achievement of a world free from animal exploitation.

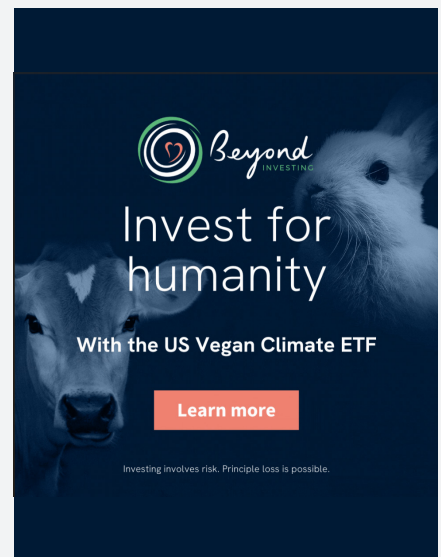
All Beyond Investing indexes screen companies for a variety of ESG (Environmental, Social, Governance) considerations, seeking to exclude companies engaged in animal exploitation, defence, human rights abuses, fossil fuels extraction, and energy production, alongside other environmentally damaging activities.

Together, the indexes have a weighted average market cap of around \$219bn, with over 1200 stocks. They are all measured against impact metrics such as avoiding greenhouse gases, limiting social and environmental harm, waste production, and water usage.

The US Vegan Climate ETF (Ticker: VEGN), the world's first vegan-friendly and climate-conscious Exchange Traded Fund, has tracked the US Vegan Climate Index since September 2019.

Beyond Investing, through its sister company and venture capital arm, Beyond Impact, operates a number of vegan venture capital funds. The flagship global Beyond Impact Funds I and II invest in innovative plant-based companies, seeding over 20 companies over the period of 2017 and 2020 and going on to participate in Series A raises and beyond from 2021 onwards.

Specialist geographic funds have been launched in the US and UK. Firstly, the Vegan Diversity Fund seeds companies with diverse founding



teams, mostly in the US. The second, the Vegan S/EIS Fund, provides early-stage financing to diverse UK businesses.

Beyond Animal operates the professional and business networking platform for the industry and assists companies in fundraising through regular educational and pitching events.

Finally, with regards to the future, Claire shares, "Our plans are to continually grow our investment product offerings to reach a larger base of investors and to expand our footprint as an investor in forward-thinking and ethical companies.

Specifically, we plan to provide access to international markets to US investors, create a global fund for European investors and continue to support our start-ups as they grow in the hope that they also become eligible to list on the stock market. By end of year we expect to be able to report significantly larger assets across the group, which will assist us in implementing the next stage of our strategy to be the world's leading ethical and sustainable investment platform."

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