

Investments at Chicory

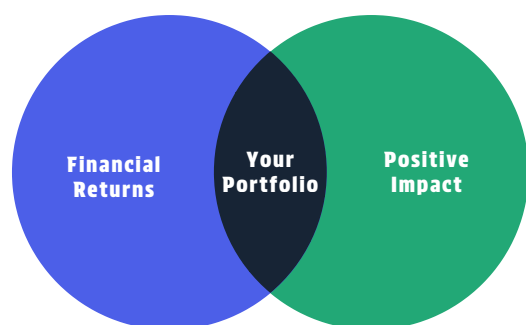
Chicory believes it is possible to achieve both **financial and ethical** returns on investments in public companies. We do this through our proprietary **Chicory Sustainable Core** portfolio.



Our Investment Philosophy

At Chicory, we believe that companies addressing the world's most urgent challenges will benefit from rising consumer demand as climate change, geopolitical instability, population growth, and resource scarcity intensify.

Chicory Sustainable Core Portfolio



Chicory Sustainable Core is a proprietary stock portfolio that is balanced and diversified across various industries that are tackling the world's most critical social and environmental crises. We avoid companies that are exacerbating harm and extracting resources from vulnerable populations.

Below is a look at the rigorous screening process our investment committee has developed to ensure that we invest in only the highest quality companies that are financially sound, on a path towards growth, and which pass our intensive ethical screens.

How We Select Your Investments

- **1. Sustainable Core Portfolio Screen**
Starting with the approx. 1300 companies in the MSCI World Index (our benchmark), we first exclude companies whose core business we determine to be counterproductive to the 17 [United Nations Sustainable Development Goals](#). We then apply our **Core Portfolio Screens**.
- **2. ESG Scoring**
Remaining companies are put through **two separate scoring methodologies** to provide a comprehensive indication of a business's sustainability:
 - [Bloomberg ESG Score](#)
 - [Robeco SDG Alignment Score](#) (modified for certain industries)
- **3. Additional Screens**
We put the highest-rated companies in each industry through a final review process using **third-party datasets** to assess a company's behavior and exposure to certain industries or controversies.
- **4. Financial Analysis**
Finally, we conduct a **financial analysis** for each company to assess their financial performance and risk level –independently, and then in comparison within their industries. This analysis includes an assessment of sales growth and strategy, profitability trends, and balance sheet health, among other criteria.
- **5. Ongoing Research & Assessment**
Companies in the Chicory Sustainable Core Portfolio are **regularly evaluated for performance and sustainability** metrics amongst Chicory's investment committee who meet at least quarterly.

The Chicory Sustainable Core Portfolio currently invests in approx. 50 companies which meet our screening methodology.
(as of July 2026)

Core Portfolio Screens

The Chicory Sustainable Core Portfolio uses a proprietary screening methodology, conducted by our in-house investment research team, which excludes companies that benefit from, or participate in the following:

-  **Private Prison Operators**
-  **Weapons Manufacturers**
-  **Brewers or Distillers**
-  **Tobacco Businesses**
-  **Fossil Fuel Extractors**

Third-Party Datasets

Data from third-party movement leaders, researchers, and investor activist groups informs these additional screens:

- Prison + Migrant Detention
- Divest for Palestine
- Quaker Compliance
- Supply Chain Prison Labor
- Supply Chain Sustainability
- Ethical Recruitment
- Sub-Minimum Wage Compensation
- Deforestation Exposure
- LGBTQ+ Equality
- Political Spending Disclosure

Why We Manage Our Own Portfolio

Standard ESG Mutual Funds / ETFs

vs

Chicory Sustainable Core Portfolio

Limited visibility into holdings & methodology

You know exactly what you're invested in

Methodology and data can be opaque, misleading, or shallow

Criteria is transparent, regularly monitored, and reported

Focus areas can feel “siloed” and overlook intersectional issues

Screens include climate, human rights, social justice & public health

“Greenwashing” ESG labels don't always reflect deeper change

Purpose-built strategy prioritizes diversified impact and investments

Read our Impact Report

Learn more about the shareholder engagement work happening at Chicory.



 **404-294-5917**

 **INFO@CHICORYWEALTH.COM**

 **WWW.CHICORYWEALTH.COM**