VADIS Persona Portfolio: Planet Protector



VADIS for the Planet Protector

One personality type clients often align with through the **Behavioral Values Questionnaire** is the Planet Protector Persona.

This Persona consists of metrics focused on GHG emissions, Toxic Water, Fossil Fuel Industry Exposure, Clean Energy Companies, and Deforestation Exposure.

This persona can be used as-is, or modified to fit a client's particular focus, while helping maximize returns and multiplying your clients' impact with authenticity, customization, and transparency

92% **Toxic Air Hazard** Harm done by toxic air pollution released in the U.S. by the company, using EPA data. **Clean Energy Companies** 13% Companies with the highest clean economy revenues, and pure-play clean energy More companies. 100% **Deforestation Producers Exposure** Agricultural commodity producers and traders linked to deforestation Less 100% **Fossil Fuel Industry Exposure** Companies operating in the fossil fuel industry, and utilities powered by fossil fuels Less 64% **Environmental Violations** Penalties paid to the US government or UK government for harming the environment.

The example shown is the YourStake comparison report of the VADIS-optimized Planet Protector Portfolio with moderately aggressive risk tolerance against the S&P500.

Why VADIS?

3 Ways to Implement VADIS



Persona Portfolios



Firm Values



Bespoke Customization

VADIS vs. Other Direct Indexing Solutions

- ✓ Over 150 metrics split across 5 key issue areas for customization (vs. 5-10)
- ✓ Investment Minimum: \$25k on Apex, \$250k on Schwab (vs. \$100k+)
- ✓ Management fees from 0.36% (vs. 0.50%+)
- ✓ Innovative, Advisor-centric platform using the latest technologies