



# PMC Gender Equity Large Cap Core Portfolio

Target market returns while emphasizing gender diversity and impact

Track large cap index returns *and* stay focused on gender diversity, gender impact, and environmental, social, and governance (ESG) principles. The PMC Gender Equity Large Cap Core Portfolio (Gender QP) helps investors benefit from diversified, low-cost market exposure and opportunities for tax management and social impact in a single, separately managed account.

## Blending tax “alpha”, “beta” investing, and gender principles

PMC’s suite of Impact Quantitative Portfolios (QPs) help address important investor needs that are often overlooked by “one-size-fits-all” passive investments.



### Customizable Market Exposure

The Gender QPs are designed to track the characteristics and returns of the Russell 1000.\* Since the investor owns the underlying securities in the portfolio, they can take advantage of opportunities for personalization and tax management.



### The Pursuit of Tax Alpha

Taxes have been referred to as the single largest cost in a portfolio. PMC QPs can be managed to help minimize an investor’s tax bill—an index based strategy in a managed account format allows for a cost-effective way to capture “tax-management alpha.”



### Supporting Gender Initiatives in Business and Society

Using data provided by research partner Sustainalytics, PMC builds the portfolio with companies focused on two main principles:

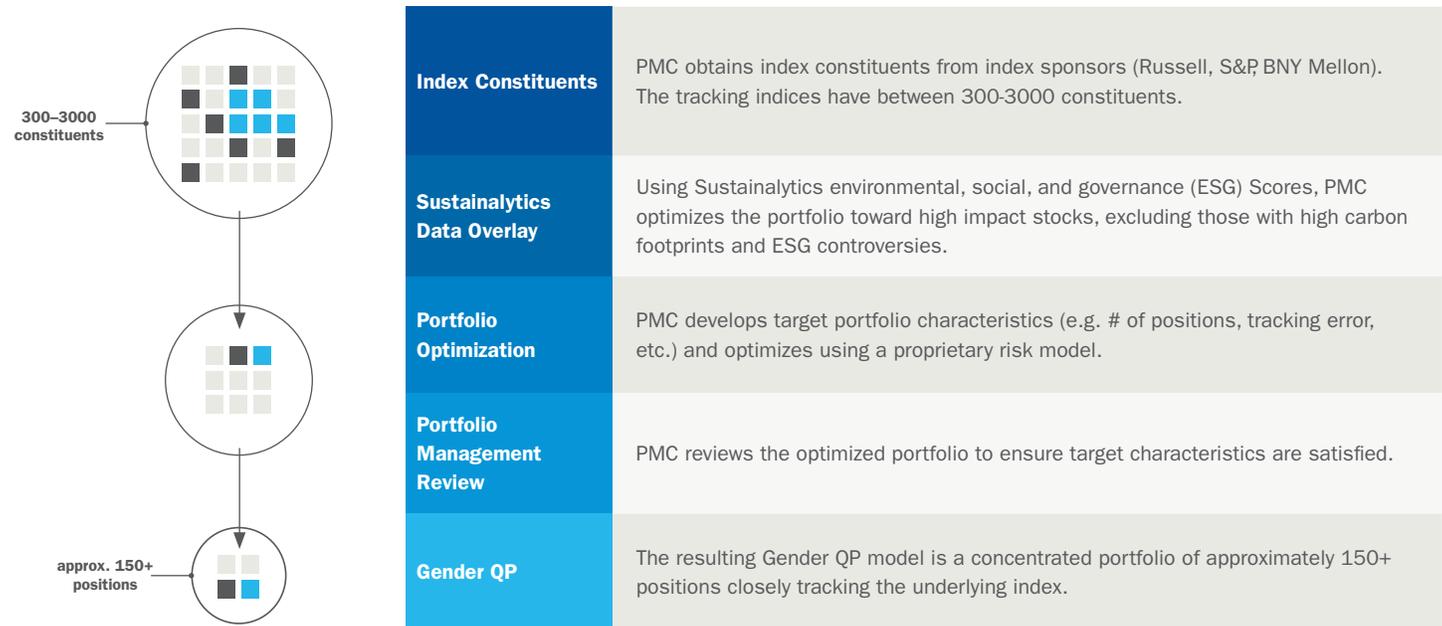
- ▶ **Gender Diversity**, which considers the gender composition of a company’s board members, as well as diversity programs and discrimination policies;
- ▶ **Gender Impact**, which indicates leadership in establishing positive opportunities for women through corporate policies and programs.

\* The Russell 1000® Index measures the performance of the Large Cap segment of the U.S. equity universe.

## Gender QP: Portfolio Construction

Each portfolio contains a subset of the constituents of a major market index and is designed to provide increased exposure to three key factors—momentum, value, and quality—that historically have provided improved risk-adjusted results over the long term.

### The Gender QP Construction Process



## Gender QP: Highlights

### Industry leadership and partnerships

The Gender QP is backed by PMC's history in impact investing, deep expertise in index-based solutions, and long-standing partnerships with industry leaders Sustainalytics and Veris Wealth Partners.

### Quantitative research expertise

PMC's Quantitative Research Group (QRG) provides the research framework, construction techniques, and portfolio management experience that drive the suite of Quantitative Portfolios.

### Diverse ESG sector allocation

The Gender QP takes a largely sector-neutral approach, providing insight into how well companies are managing the ESG and gender issues to which they are exposed.

### Accessibility for a broad range of investors

The Gender QP is available as an SMA on the Investnet platform for accounts at a minimum of \$100,000.

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