



Impact Quantitative Portfolios

Targeted solutions to achieve tax “alpha”, “beta” investing, and impact

Built on a history in impact investing, quantitative expertise, and partnerships with industry leaders, the PMC Impact Quantitative Portfolios track traditional market indexes with an explicit focus on companies with high sustainability ratings and/or environmental, social, and governance priorities. Investors benefit from cost-efficient beta exposure, access to important market segments, opportunities for tax management and social impact in a single, separately managed account.

Elevate the Impact Investing Experience

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 Large Cap Impact QPs are designed to track the characteristics and returns of the Russell 1000*. The portfolios provide cost-efficient beta exposure across multiple domestic and international categories in an SMA. Since the investor owns the underlying securities, 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. 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”.



Align Holdings with Impact Priorities

At both the security level and the industry level, the Impact QPs address concerns such as conflicts of interest, social responsibility, or industry overexposures. The Large Cap Impact QP is focused on companies across a broad range of environment, social, and governance indicators. Gender Lens and Carbon-Focused QPs are also in development.

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

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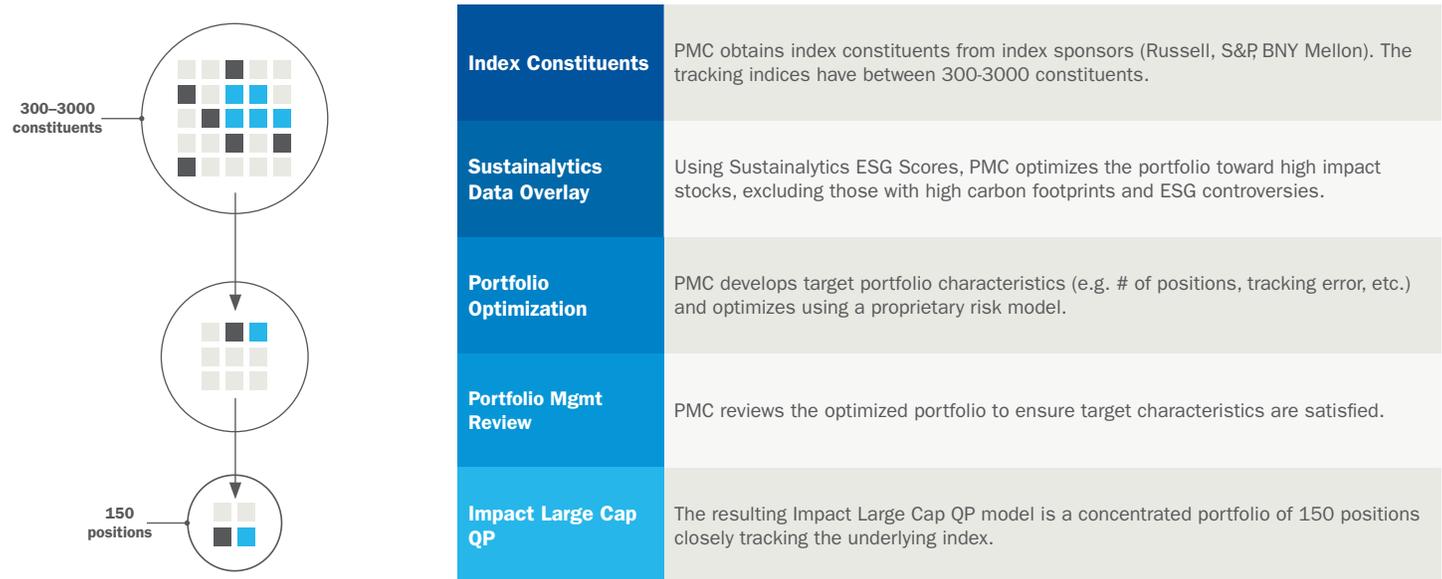
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Quantitative Research Group

Large Cap Impact QP: Portfolio Construction

The Large Cap Impact QP contains a subset of the constituents of a major market index and is designed to mimic the portfolio characteristics of the index as a whole.



Large Cap Impact QP: Highlights

Industry leadership, expertise, partnerships

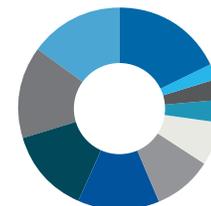
PMC’s history in impact investing, deep expertise in index-based solutions, and long-standing partnerships with industry leaders Sustainalytics and Veris Wealth Partners are the foundation of the Impact QPs.

Diverse ESG sector allocation

The Large Cap portfolio takes a largely sector-neutral approach, providing insight into how well companies are managing the ESG issues to which they are exposed.

Accessibility for broad range of investors

The Impact QPs are available as an SMA on the Envestnet platform, for accounts at a minimum of \$100,000.



- Technology
- Communication Services
- Utilities
- Real Estate
- Energy
- Consumer Defense
- Financial Services
- Consumer Cyclical
- Industrials
- Healthcare

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Investments in smaller companies carry greater risk than is customarily associated with larger companies for various reasons such as volatility of earnings and prospects, higher failure rates, and limited markets, product lines or financial resources. Investing overseas involves special risks, including the volatility of currency exchange rates and, in some cases, limited geographic focus, political and economic instability, and relatively illiquid markets. Income (bond) funds are subject to interest rate risk which is the risk that debt securities in a fund’s portfolio will decline in value because of increases in market interest rates.

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