


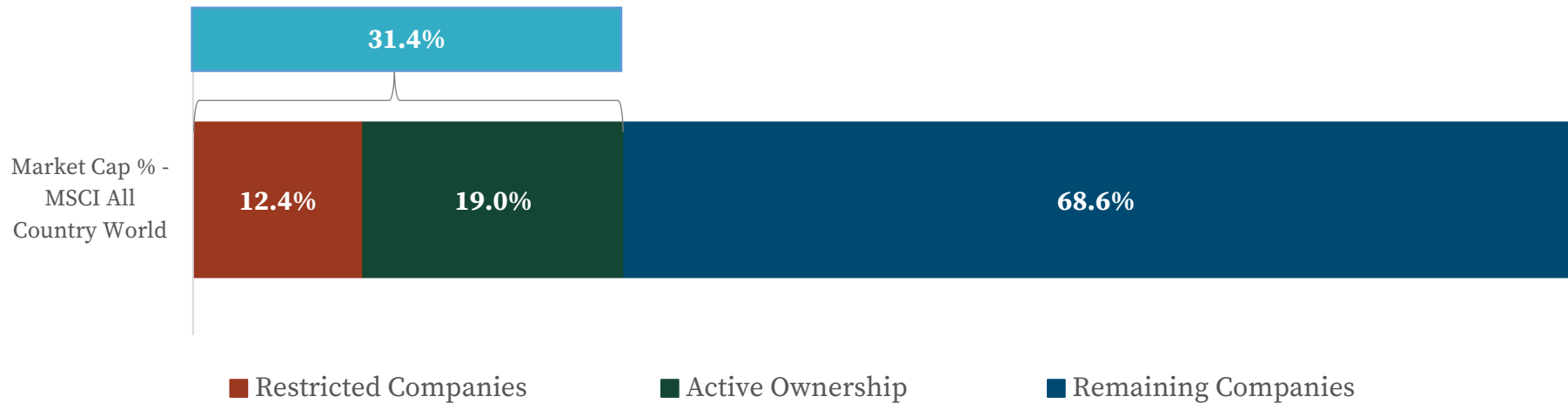


“**Mensuram Bonam**” Faith-Based Measures for Catholic Investors: A Starting Point and Call to Action



 Engage	 Enhance	 Exclude
<ul style="list-style-type: none">• Leverage ownership to influence enterprises• Utilize tools including dialogue, coalitions, resolutions, and public policy	<ul style="list-style-type: none">• Seek positive investments that align with Catholic Social Teaching• Adopt a proactive stance regarding the contributions or potential of funds or enterprises needed for integral development	<ul style="list-style-type: none">• Exclude or limited investment areas• Discern on engagement versus enhancement

Call to Engage & Exclude: CBIS Multi-Faceted Approach



Source: *FactSet, as of December 31, 2024*

Catholic Responsible Investments (“CRI”) is an investment strategy designed specifically to help investors seek sound financial returns while remaining faithful to the teachings of the Roman Catholic Church. The Fund considers the Adviser’s CRI criteria in its investment process and may choose not to purchase, or may sell, including at inopportune times which would result in losses to the Fund, otherwise profitable investment in companies which have been identified as being in conflict with the Adviser’s CRI criteria. Funds may underperform other similar funds that do not consider CRI guidelines when making decision.

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Engage

- Leverage ownership to influence enterprises
- Utilize tools including dialogue, coalitions, resolutions, and public policy



Enhance

- Seek positive investments that align with Catholic Social Teaching
- Adopt a proactive stance regarding the contributions or potential of funds or enterprises needed for integral development



Exclude

- Exclude or limited investment areas
- Discern on engagement versus enhancement

Faith-Consistent Investing

Catholic
Responsible
Investments™





Views on Fossil Fuels from Around the World

Mensuram Bonam and the German, Austrian, Italian, and U.S. Catholic Conferences specifically express concern about climate change.




- German Bishops mention disrespect for minimum ecological standards.
- Austrian Bishops exclude companies producing natural gas by fracking or producing crude oil by fracking or from tar sands.
- Italian Bishops explicitly restrict companies involved in the extraction, use, and production of energy based on coal.
- USCCB says it will consider divestment from those companies that consistently fail to initiate policies intended to achieve the Paris Agreement goals.

Catholic Responsible Investments' Ecosystem



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