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# Sustainable ETF Strategies

1Q 2026

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*Strategy Overview*

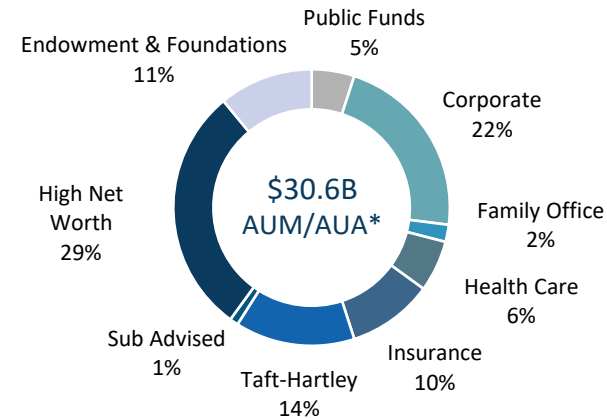
Sage Advisory Services  
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Building 1, Suite 100  
Austin, Texas 78735

SUSTAINABLE  
 SAGE

## Who We Are

- Founded in 1996
- 100% employee operated
- 17-member investment team has an average industry experience of 18 years
- Responsible Investing strategies include SRI, Sustainable, Impact, Values Based, and Mission Driven

## Who We Serve



## Responsible Investment Organization Affiliations



Signatory



Affiliate



Inclusion Code Signatory



Member



Signatory





Signatory



Member

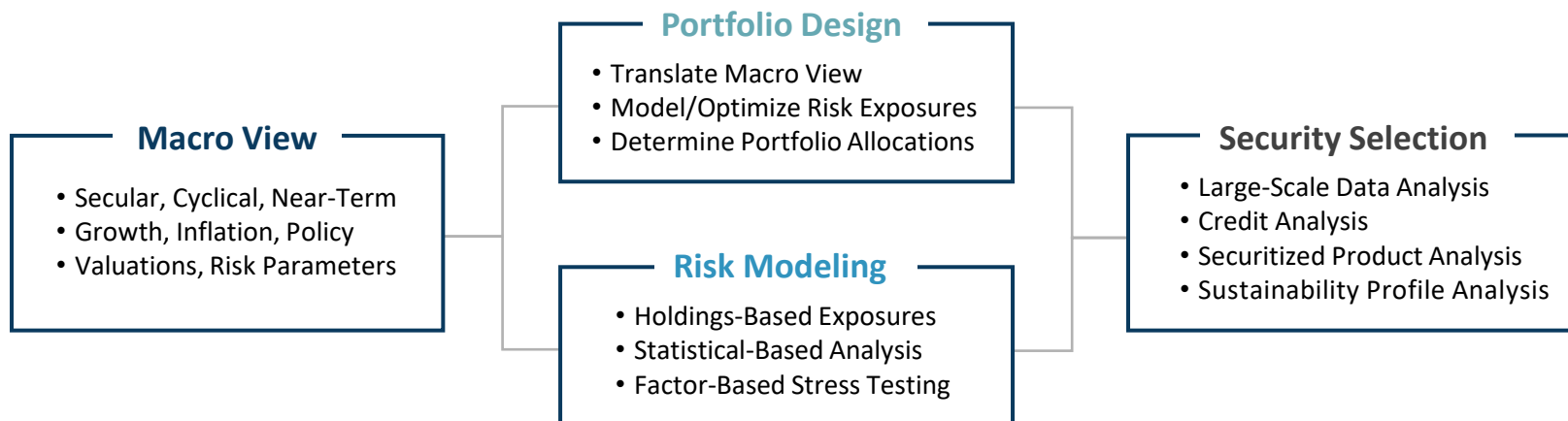
\*Preliminary AUM/AUA as of 3/31/2026. \*\* "Who We Serve" is client type by AUM/AUA.

<p><b>Sustainable Global Equity Strategy</b> MSCI All Country World</p>	<p>Actively managed global equity strategy that invests across domestic and international equity market segments through ETFs with a favorable sustainability profile.</p>	 <p><b>Allocation Target</b> 100% Equity</p>
<p><b>Sustainable Growth Balanced Strategy</b> 70% MSCI All Country World 30% Bloomberg Aggregate</p>	<p>Actively managed balanced strategy that employs a tactical approach to asset allocation using equity, fixed income, alternatives, and cash through ETFs with a favorable sustainability profile.</p>	 <p><b>Allocation Target</b> 70% Equity / 30% Fixed Income</p> <p><b>Equity Allocation Range</b> 50%-90%</p>
<p><b>Sustainable Moderate Balanced Strategy</b> 50% MSCI All Country World 50% Bloomberg Aggregate</p>	<p>Actively managed balanced strategy that employs a tactical approach to asset allocation using equity, fixed income, alternatives, and cash through ETFs with a favorable sustainability profile.</p>	 <p><b>Allocation Target</b> 50% Equity / 50% Fixed Income</p> <p><b>Equity Allocation Range</b> 30%-70%</p>
<p><b>Sustainable Conservative Balanced Strategy</b> 30% MSCI All Country World 70% Bloomberg Aggregate</p>	<p>Actively managed balanced strategy that employs a tactical approach to asset allocation using equity, fixed income, alternatives, and cash through ETFs with a favorable sustainability profile.</p>	 <p><b>Allocation Target</b> 30% Equity / 70% Fixed Income</p> <p><b>Equity Allocation Range</b> 10%-50%</p>
<p><b>Sustainable Core Plus Strategy</b> Bloomberg Aggregate</p>	<p>Actively managed fixed income strategy that aims to provide excess yield and strong risk-adjusted returns with a favorable sustainability profile by investing across core and non-core fixed income segments.</p>	 <p><b>Allocation Target</b> 100% Fixed Income</p>

## Our Approach

### Investment Process

*Our teams work together to balance the development of our macro views with thoughtful portfolio design, value-driven security selection, and active risk management.*



## Sustainable ETF Investment Framework

### Investment Process

#### Asset Allocation Decisions

Macroeconomic Environment  
Market Capitalization & Style  
Regional Distribution

#### ETF Selection

Index Methodology  
ETF Structure  
Security Traits  
Stewardship Analysis

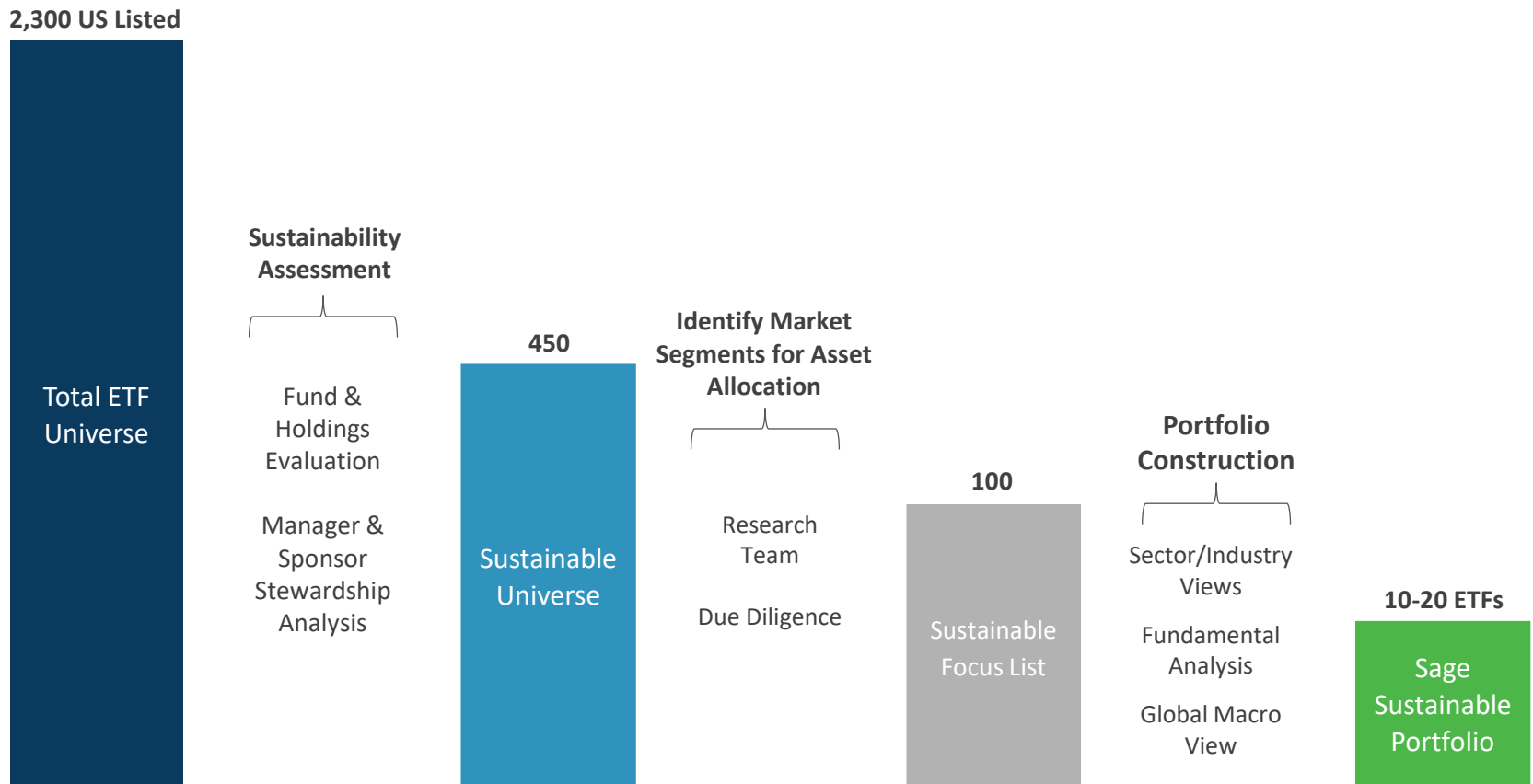
#### Sustainability Assessment

ISS/Morningstar  
Aggregate of Exposures  
Portfolio Level Scoring



## Sustainability Investment Framework

### ETF Selection Process



## Bottom Line

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### Why Choose Sage?

01

#### Consistent Investment Process

Rely upon traditional, seasoned investment products and active risk management.

04

#### Original and Comprehensive Market and Sustainable Research

Provide timely thoughts and original research.

02

#### ETF Implementation

ETFs are the most efficient vehicle to build consistent, globally diversified strategies.

05

#### Portfolios Tailored to Client's Values

Portfolios can be customized to align with the mission or values of an organization or individual.

03

#### Transparent Investment Process and Portfolio Reporting

Comprehensive and continuous portfolio reporting on fundamental financial and sustainability risks.

06

#### Seasoned & Dynamic Investment Team

Global perspective applied with common sense, supported by quantitative and scientific data.

# Responsible Investing Reporting & Research

## Client Reporting

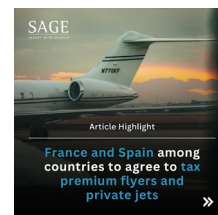
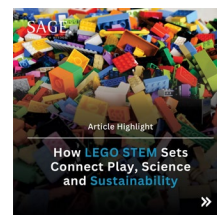
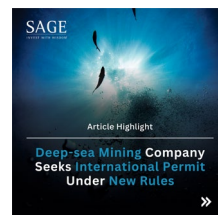
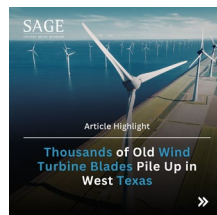
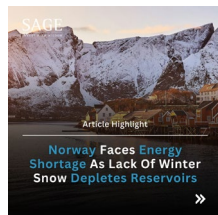
- Monthly portfolio reviews detailing Sage Leaf Scores® by security
- Quarterly impact and climate reports
- Quarterly portfolio performance reviews
- Semiannual sustainability trend assessments

## Market Research

- Monthly Sustainability Perspectives publications
- Monthly market commentaries
- Quarterly strategy reviews
- Special reports and conceptual analyses
- Sustainability website info and video content



## Sage's Instagram



## IMPORTANT DISCLOSURES

This report is for informational purposes only and is not intended as investment advice or an offer or solicitation with respect to the purchase or sale of any security, strategy or investment product. Although the statements of fact, information, charts, analysis and data in this report have been obtained from, and are based upon, sources Sage believes to be reliable, we do not guarantee their accuracy, and the underlying information, data, figures and publicly available information has not been verified or audited for accuracy or completeness by Sage. Additionally, we do not represent that the information, data, analysis and charts are accurate or complete, and as such should not be relied upon as such. All results included in this report constitute Sage's opinions as of the date of this report and are subject to change without notice due to various factors, such as market conditions. No part of this Material may be reproduced in any form, or referred to in any other publication, without our express written permission.

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