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Sustainable ETF Strategies

3Q 2026

Strategy Overview

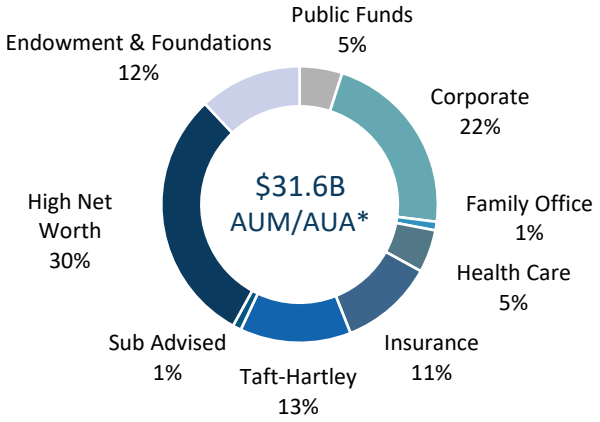
Sage Advisory Services
5900 Southwest Parkway
Building 1, Suite 100
Austin, Texas 78735

SUSTAINABLE SAGE

Who We Are

- Founded in 1996 — Based in Austin, Texas
- 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

PRI Principles for Responsible Investment — Signatory

INTERFAITH CENTER ON CORPORATE RESPONSIBILITY — Affiliate

CFA Institute — Inclusion Code Signatory

IFRS Sustainability Alliance — Member

Climate Action 100+ — Signatory

RACE TO ZERO — Signatory

Intentional Endowments Network — Member

*Preliminary AUM/AUA as of 9/30/2026. ** "Who We Serve" is client type by AUM/AUA.

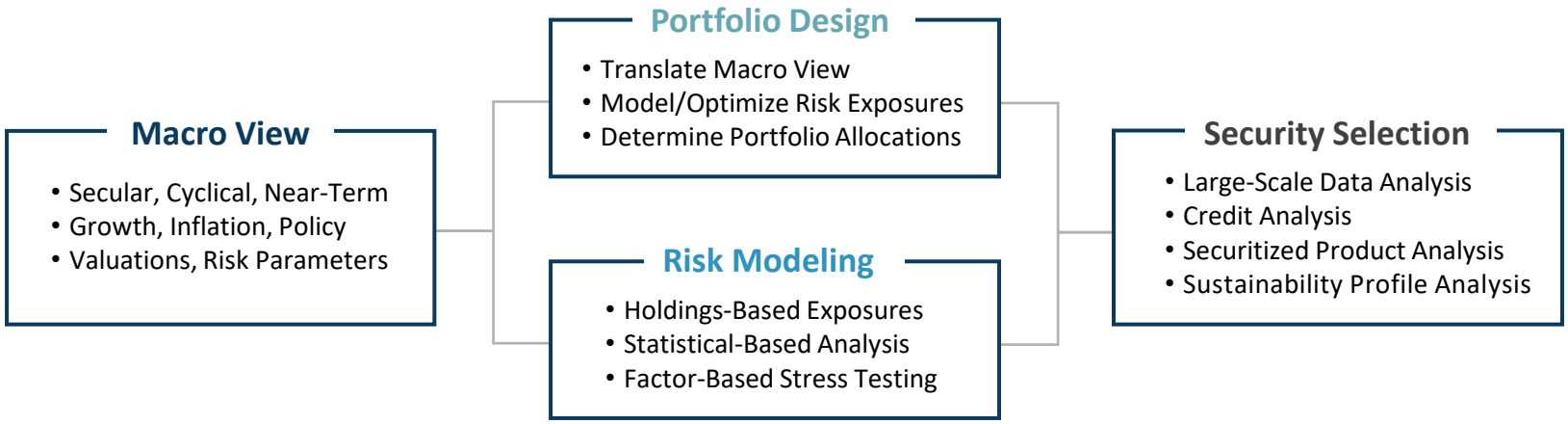
Sustainable ETF Strategies Overview

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

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.



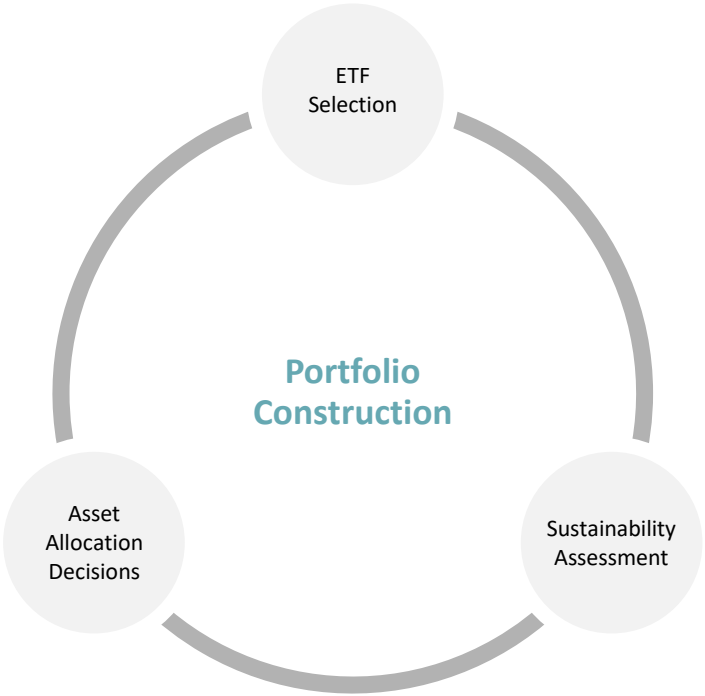
Sustainable ETF Investment Framework

Investment Process

Asset Allocation Decisions
Macroeconomic Environment
Market Capitalization & Style
Regional Distribution

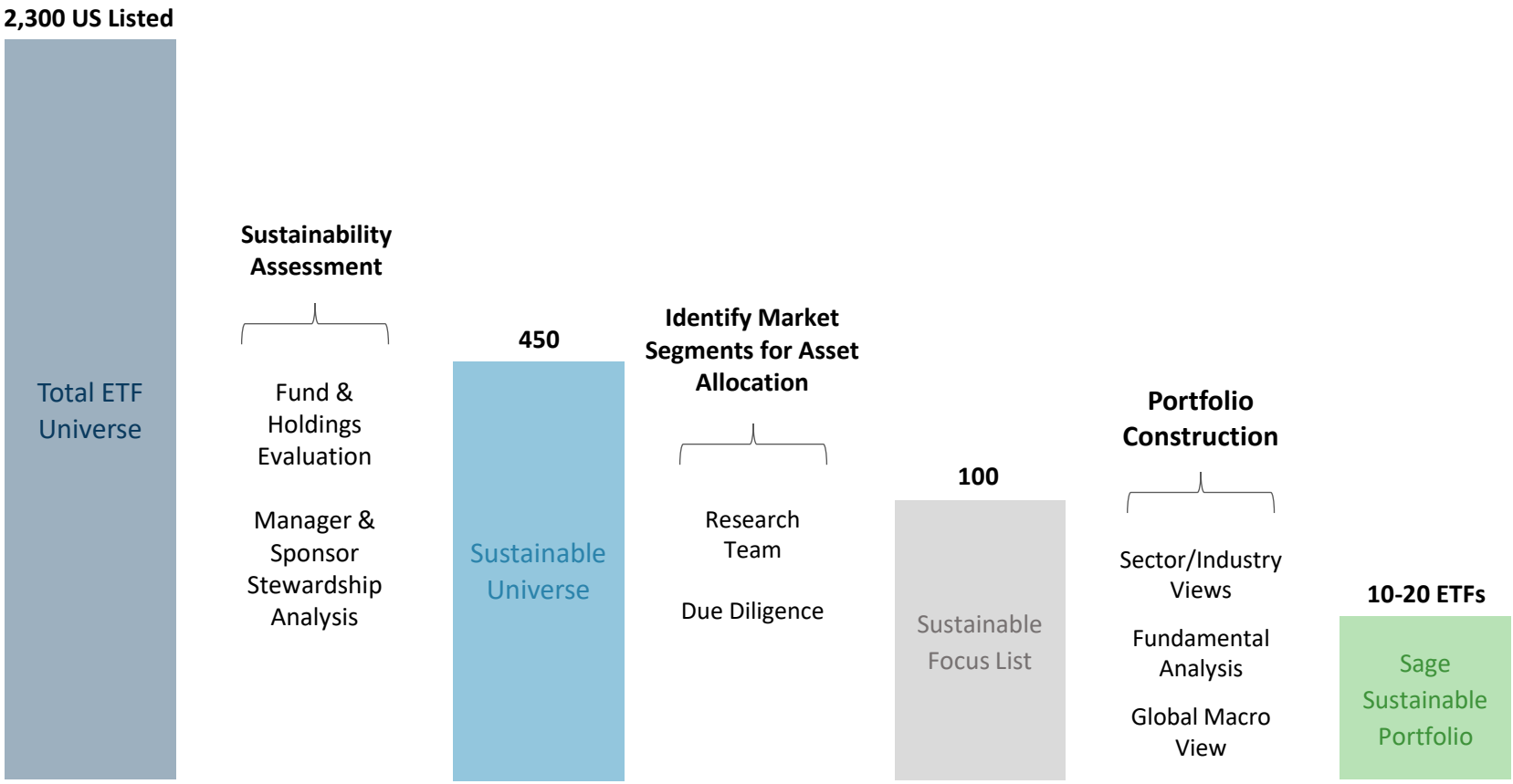
ETF Selection
Index Methodology
ETF Structure
Security Traits
Stewardship Analysis

Sustainability Assessment
ISS/Morningstar
Aggregate of Exposures
Portfolio Level Scoring



Sustainability Investment Framework

ETF Selection Process



Bottom Line

Why Choose Sage?

01

Consistent Investment Process

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

02

ETF Implementation

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

03

Transparent Investment Process and Portfolio Reporting

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

04

Original and Comprehensive Market and Sustainable Research

Provide timely thoughts and original research.

05

Portfolios Tailored to Client's Values

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

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

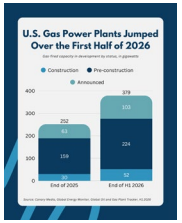
Market Research

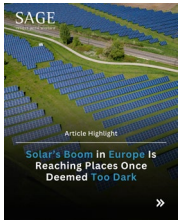
- Monthly Sustainability Perspectives publications
- Monthly market commentaries
- Quarterly strategy reviews
- Special reports and conceptual analyses
- Sustainability website info and video content

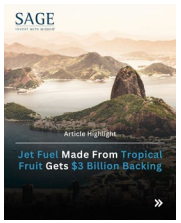


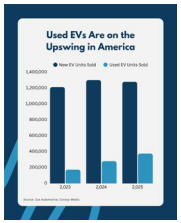
Sage's Instagram

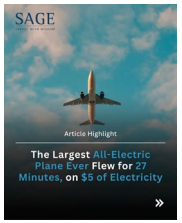


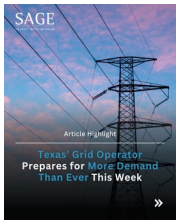












IMPORTANT DISCLOSURES

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