



The Forum for Sustainable and Responsible Investment

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## Sustainable, Responsible and Impact Mutual Fund and ETF Chart

**Fund Profile:**

### Green Century MSCI International Index Fund - Institution

#### General Fund Information

**Ticker:** GCIFX

**Assets under management (AUM):** \$72.73M (in US\$ millions)

**General Fund Type:** International, Global, Foreign

**Specific Sizes or Types of Investments:** Mid- and large-cap stocks from developed countries

**Financial Objective:** Long-term total return from stocks of foreign companies selected based on environmental, social, and governance criteria.

**Specific ESG Focus:** The Green Century Equity Fund tracks the MSCI ex USA SRI ex Fossil Fuels Index. Companies are rated based on their ESG performance.

**To invest, call:** (800)93-GREEN (800-934-7336)

#### Fund Institution Information

**Institution Name:**

Green Century Funds

**Mutual Funds Description:** Environmentally responsible mutual funds founded by nonprofit environmental advocacy organizations. The Balanced Fund (GCBLX) is fossil-fuel free and invests in the stocks and bonds of companies with clean environmental records. The Equity Fund (GCEQX) invests in the stocks of the longest-running sustainable investment index, the MSCI KLD 400 Social Index. The Funds are committed to shareholder activism as a critical component of responsible investing.

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#### Account Minimums

**Minimum Account:** \$250,000

**Minimum IRA:** \$250,000

## Methodology

**Screening Venue:** Outside

**Screening Party:** MSCI ESG Research

**Screening Database Used:** Proprietary MSCI ESG Research database

**Screening Process:** The Green Century MSCI International Index Fund tracks the MSCI ex USA SRI ex Fossil Fuels Index. The underlying index is reviewed and updated quarterly by MSCI, utilizing exclusionary and qualitative screens in their analysis when adding companies to or deleting them from the Index. The ESG research is provided by MSCI's ESG Research team, which is among the largest in the industry with over 250 global staff of ESG research analysts.

## Proxy Voting Information

**Proxy Voting Guidelines or Policies:** [Open external link in new window](#)

**Proxy Voting Records:** The Green Century International Index Fund commenced operations on September 30, 2016; its proxy voting record for the year ending June 30, 2017 will be available as of the end of August 2017.

## Specific Screening Information by Category

### Environment

- **Climate / Clean Technology:** *Combination of Positive and Restricted/Exclusionary Strategies* - The Green Century MSCI International Index Fund is a fossil fuel free, low carbon, foreign investment option that avoids carbon-intensive companies and instead invests in sustainable and environmentally responsible leaders in a wide variety of industries. The International Fund does not invest in companies that explore for, extract, produce, manufacture or refine coal, oil or gas or produce or transmit electricity derived from fossil fuels or transmit natural gas or have material carbon reserves.
- **Pollution / Toxics:** *Restricted/Exclusionary Investment* - Avoid companies that are heavy polluters or use toxic chemicals in their products.
- **Other Environmental:** *Combination of Positive and Restricted/Exclusionary Strategies* - Proactive investment in companies involved in water treatment and conservation, air pollution control, and pollution prevention; also companies with with eco-friendly products and supply chain environmental policies. Avoid companies that flout basic standards and protection of the environment.

### Social

- **Diversity & Equal Employment Opportunity:** *Combination of Positive and Restricted/Exclusionary Strategies* - Seek companies with good governance practices such as policies and practices to support a diverse work environment. Avoid companies with poor track record in diversity.
- **Human Rights:** *Combination of Positive and Restricted/Exclusionary Strategies* - Seek companies with good governance practices such as policies and practices to support a diverse work environment. Avoid companies with poor track record in human rights.
- **Labor Relations:** *Combination of Positive and Restricted/Exclusionary Strategies* - Seek companies with good governance practices such as policies and practices to support a diverse work environment. Avoid companies with poor track record in employee relations.

### Governance

- **Board Issues:** *Combination of Positive and Restricted/Exclusionary Strategies* - Seek companies with good governance practices such as sufficient Board oversight - especially on sustainability issues and incorporating environmental, social, and governance performance factors to compensation calculations. Avoid poor performers.
- **Executive Pay:** *Combination of Positive and Restricted/Exclusionary Strategies* - Seek companies with good governance practices such as policies and practices that support fair and equitable pay. Avoid poor performers.

### Products

- **Alcohol:** *No Investment* - No investment in companies with significant involvement in alcohol products, sales, or

marketing.

- **Animal Welfare:** *Restricted/Exclusionary Investment* - No investment in companies that do not protect the humane treatment of animals.
- **Defense/Weapons:** *No Investment* - No investment in companies with significant involvement in military or civilian firearms.
- **Gambling:** *No Investment* - No investment in companies with significant involvement in gambling.
- **Tobacco:** *No Investment* - No investment in companies with significant involvement in tobacco products, sales, or marketing.

## Other

- **Shareholder Engagement - Shareholder Resolutions:** Filed or co-filed with companies on environmental, social or governance issues
- **Shareholder Engagement - Private Dialogue:** Conducted with companies on environmental, social or governance issues
- **Description of Shareholder Engagement:** *Green Century is involved in a variety of shareholder engagements from voting our proxies in alignment with ESG criteria and dialogue with companies to filing shareholder resolutions. Green Century is also active in policy issues such as testifying in support of fossil fuel divestment, participating in industry committees, and coordinating responsible investing industry coalitions and sign-on letters.*

## Performance Data

**Data provided by:** Bloomberg - Information current as of April 30, 2020

**Year-to-date rate of return:** -13.8%

**1-year rate of return:** -4.44%

**3-year rate of return:** 1.5%

**5-year rate of return:** --

**10-year rate of return:** --

**Previous year rate of return:** 25.5%

**Management fee:** 0.28%

**Expense ratio:** 0.98%

**Standard deviation:** 19.37%

**Benchmark used:** MSCI World ex USA | [External link](#)

**Disclaimer:** You should carefully consider the Funds' investment objectives, risks, charges, and expenses before investing. To obtain a Prospectus that contains this and other information about the Funds, please visit [www.greencentury.com](http://www.greencentury.com), email [info@greencentury.com](mailto:info@greencentury.com), or call 1-800-93-GREEN. Please read the Prospectus carefully before investing.