



Nucleus Wealth Ethical / Portfolio Screens November 2019

CLIMATE CHANGE

Fossil Fuels (High Impact) - This removes the worst polluters, in particular, companies that use Lignite coal or create oil from Tar Sands

Fossil Fuels (Broad) - This removes companies where more than 10% of the company is involved in coal, oil or gas

Fossil Fuels (CSG) - This removes companies who are involved in Coal Seam Gas extraction and fracking

Nuclear - Removes companies with Nuclear power stations or producers of Uranium

Loggers - OGF - Remove companies that are involved with logging Old Growth Forests

WAR

Arms (High Impact) - Removes companies that are known to produce cluster munitions and landmines

Arms (Broad) - Removes companies that are known to directly produce weapons or ammunition

HUMAN RIGHTS

No Undemocratic Countries - Removes companies from countries that score below 7 on the Democracy Index (from the Economist Intelligence Unit). Note this category removes some countries that are rated as Flawed Democracies like Singapore, Hong Kong or Brazil.

No Economically Repressed Countries (Any and Worst Offenders) - Removes companies from countries that rate either "Repressed" or "Mostly Unfree" as assessed by the Index of Economic Freedom (Wall Street Journal and the Heritage Foundation). Also removes companies where more than 20% of the company is owned by a government organization from a country that is Repressed or Mostly Unfree

No Morally Repressed Countries (Worst Offenders) - Removes companies from countries that rate "Insufficient Moral Freedom" or below as assessed by the World Index of Moral Freedom. Also removes companies where more than 20% of the company is owned by a government organization from a country that has low or very low moral freedom. Religious freedom, bioethical freedom, drugs freedom, sexual freedom, and family and gender freedom are assessed.

Immigration Detention - Removes companies involved in immigration detention centres

Jails - Removes companies involved in running jails

HEALTH

Fast Food - Removes companies that produce sugar or fast food

GMO Foods - Remove companies that grow food using Genetically Modified Organisms

VICES

Gambling - Removes companies that have more than 5% of sales from gaming

Alcohol - Removes producers of alcohol

Pornography - Removes companies where pornography comprises more than 10% of revenue

Tobacco - Remove companies that manufacture Tobacco products

Cannabis - Removes companies that operate in the legal cannabis market

ANIMAL RIGHTS

Animal Testing (Broad) - Removes companies that test products on animals in general

Animal Testing (High Impact) - Removes companies that test products on animals for non medical purposes

RELIGION

Contraception - Removes companies that manufacture contraceptive products

Sharia / Islamic - Confines your investment to companies within the MSCI AC World Islamic index

PORTFOLIO SCREENS

No Australian Banks - Removes all Australian Banks from the portfolio

No Australian Shares - Removes all Australian Listed Shares from the portfolio

Limit Australian Housing Exposure - Remove any property developers, REITS, Australian Banks, Housing consumer discretionary