



INTRODUCTION TO BUSINESS 360[®]

Business 360[®] is our framework for evaluating companies holistically. This proprietary framework combines data with human research and discernment to produce a 360-degree assessment of a company's value creation and value extraction.

We seek companies that produce good products and demonstrate good practices. When a company fails these standards, we *avoid* participating in their ecosystem. When a company embodies these values, we *embrace* them as an option for investment. Finally, for those which are on the cusp of our standards, we *engage* with management teams to seek and maintain values alignment.

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Reference to Eventide's Business 360[®] approach is provided for illustrative purposes only and indicates a general framework of guiding principles that inform Eventide's overall research process. Information in this piece is as of October 14th, 2025.

Data

- We source data from six external vendors (Sustainalytics, ISS, Biblically Responsible Investing Institute, etc.) as well as an internal web-scraping tool.
- We have collected over 200+ million data points on 6,500+ companies.
- Our proprietary software platform combines this mosaic of data with our assessment of severity and materiality.

Discernment

- 17 values-driven fundamental analysts and a dedicated team of ethical researchers provide a dual layer of analysis including both traditional equity research and an assessment of values alignment.
- Our Business 360® reports delve into a company's treatment of key stakeholders, the inherent value of its products, and an assessment of management.
 - In certain cases, we conduct a deeper dive into company leadership's litigious history and professional experience.

~10,000 Hours

per year are devoted to the data & discernment process.

3,000 Manual Overrides

on data points across 1,500+ companies by Eventide's discernment process to thoughtfully ensure companies are accurately and completely understood within our Business 360® matrix.

These data and discernment inputs shape our Business 360® screening process

Avoid



- We rigorously screen our investments in order to avoid products and practices that cause harm, including:
 - Abortion, abortifacients, and contraceptives
 - Alcohol
 - Animal harm
 - Controversies related to key stakeholders (human rights violations, environmental damage, deceptive marketing, etc.)
 - Corporate Discrimination
 - Embryonic stem cell research
 - Gambling
 - Pornography & Explicit Content
 - Predatory lending
 - Tobacco & cannabis
 - Weaponry

Embrace

- Once a company passes our avoidance screening, we look for leaders in stakeholder value creation.
- We evaluate each company in our portfolio for:
 - ▶ **Good products that meet at least one of the below categories:**
 - Develop or enhance the good in the world
 - Sustain the world's resources and order
 - Restore what is broken in the world
 - ▶ **Good practices that serve six key stakeholders:**
 - Customers
 - Employees
 - Suppliers
 - Community
 - Environment
 - Society

Engage

- If a single issue or lack of clarity is preventing us from passing an otherwise-good company, we will perform a company engagement.
 - ▶ **Over 200 company engagements logged in the past 5 years**
- We proxy vote in alignment with our prospectus values, using a custom proxy policy and input from our Business 360® and leadership teams.
 - ▶ **13,000+ proxy votes submitted annually**