



## GOOD FOR PEOPLE, THE PLANET AND YOUR POCKETBOOK – VEGAN ETF CELEBRATES TWO YEARS OF OUTPERFORMING THE S&P 500

*The world's first and only vegan Exchange Traded Fund, the US Vegan Climate ETF (ticker: VEGN) marks two years since launch with almost \$65million in assets and outperformance versus the S&P500 Index since inception*

**Tampa, FL, September 9, 2021**

Two years ago – September 2019, when Beyond Investing launched the world’s first vegan-friendly, climate-conscious ETF, it was an uphill battle to explain *why* other funds which purported to follow environmental and social principles were actually not doing so.

Today, greater understanding of ethical investment, of the dire eco-emergency, and of the need to pay more than lip service to ESG goals has seen the VEGN ETF perform **better** than the US benchmark S&P 500 Index - and attract around US\$65 million in assets.

VEGN has returned a total of 67.91% vs S&P 500 Index’s 57.07% (on market price) since inception to end of August 2021.

Claire Smith, CEO of Beyond Investing, and a renowned global expert in ethical investment, says: “More than anything, the enormous success of VEGN ETF underlines that animal-friendly and climate-conscious investing can be good for people, planet and your pocketbook. With the expansion of our product range into global small cap thematic and regional vegan climate indexes, our aim is to provide complete portfolio solutions for vegans and environmentalists that bring about a kinder, cleaner, healthier world.”

With this goal in mind, the fund is free from animal exploitation<sup>1</sup>, weapons-free and free from fossil fuels<sup>1</sup>. VEGN aims to avoid investing in any activities that harm animals, screening out companies that are involved in animal testing, animal-derived products, as well as animals in sports and entertainment. The US Vegan Climate ETF (VEGN) also has a lower carbon footprint (-77%), waste footprint (-98%), and water footprint (-93%) per unit of revenue than the S&P 500 and many other ESG indexes<sup>2</sup>.

Furthermore, VEGN is the only US Equity Fund that scores this highly across all of the following measures<sup>3</sup>:

- Fossil-Free (A)
- Deforestation-Free (A)
- Gun-free (A)
- Weapons-free (A)
- Tobacco-free (B)
- Gender Lens (B)

The fund tracks the performance of Beyond Investing's US Vegan Climate Index ("VEGAN" or the "Index"). Taking the largest 500 stocks in the U.S. market, VEGAN excludes companies engaged in animal exploitation, defense, human rights abuses, fossil fuels extraction and energy production, and other environmentally damaging activities.

In June 2021, Beyond Investing massively expanded its range of animal-friendly investment products, further underlining its growing popularity and carefully managed organic growth.

The launch of five new investment products, in partnership with its affiliate Beyond Impact, sees products spread across both public and private markets, providing more options to investors and furthering Beyond Investing's mission of a world free from animal exploitation.

Beyond Investing and Beyond Impact claim to contribute to the achievement of 11 of the 17 United Nations Sustainable Development Goals, across themes of hunger, sustainability, climate, biodiversity, health, water, work, clean energy and gender equality.

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### **About Beyond Investing**

Beyond Investing is a vegan investment platform comprising Beyond Investing, a US-based registered investment advisor, Beyond Advisors, a Jersey-based research firm, and Beyond Impact Advisors, a Swiss-based investment advisor. It is owned by three experienced investment professionals who follow a vegan lifestyle: CEO Claire Smith who has 35 years' experience working in the finance industry at UBS and as a partner at Albourne in areas including derivatives and investment research; Lee Coates, OBE, founder of UK financial advisor Ethical Investors and founder of Cruelty Free Super in Australia; and Larry Abele, founder of Impact-Cubed, an FCA-regulated asset manager recognized for its leadership in ESG research and investing.

Visit [www.beyondinvesting.com](http://www.beyondinvesting.com) for more information.

*1. According to tolerance defined within index rules*

*2. Impact data courtesy of Impact Cubed IC as at 30 June 2021.*

*3. According to As You Sow's Invest Your Values online tools which screen mutual fund holdings against specific environmental, social, and governance issues. ([www.asyousow.org/invest-your-values](http://www.asyousow.org/invest-your-values))*

### **Media Enquiries:**

Claire Smith of Beyond Investing is available for comment or interview.

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An online press kit is available at: <http://bit.ly/beyondinvesting>

For further information about Beyond Investing, please visit <http://www.beyondinvesting.com>

### **Investor and Financial Intermediaries Enquiries:**

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Standardised performance to 30<sup>th</sup> June 2021:

	1-year	Since inception (annualised)
VEGN Market Price	44.32%	29.61%
VEGN NAV	44.53%	29.64%
VEGAN Index	45.73%	30.70%
S&P500 Index	40.79%	24.63%

Expense ratio: 0.60%

**Performance disclosure: The performance data quoted represents past performance. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when sold or redeemed, may be worth more or less than their original cost and current performance may be lower or higher than the performance quoted. Performance current to the most recent month-end can be obtained by calling (1-800-617-0004).**

**Short-term performance, in particular, is not a good indication of the fund's future performance, and an investment should not be made based solely on returns.**

*The fund's investment objectives, risks, charges and expenses must be considered carefully before investing. The prospectus contains this and other important information about the investment company, and it may be obtained by calling 1-800-617-0004 or visiting [www.veganetf.com](http://www.veganetf.com). Read it carefully before investing.*

*Beyond Investing LLC is the adviser to the US Vegan Climate ETF. VEGN is distributed by Quasar Distributors, LLC.*

**Investing involves risk, including the possible loss of principal. Shares of any ETF and bought and sold at market price (not NAV), may trade at a discount or premium to NAV and are not individually redeemed from the Fund. Brokerage commissions will reduce returns. Investments in mid-cap securities involve additional risk such as limited liquidity and greater volatility. The index methodology may cause the Fund to underperform the broader equity market or other funds which do not utilize such criteria. The Fund's return may not match or achieve a high degree of correlation with the return of the underlying Index. To the extent the Fund utilizes a representative sampling approach, it may experience tracking error to a greater extent than if the Fund had sought to replicate the Index.**

The "As You Sow" Ratings gives each fund a grade (A, B, C, D, or F) on ownership of companies based on environmental and social issues, including climate change, gender equality and weapon investments. Funds that have no holdings in any of these categories receive an A. Funds with no holdings in these producers/sellers receive a B if their net assets invested in the other categories are below median and a C if above. Companies with holdings in these producers/sellers receive a D if their total net assets investing in companies from all categories is below median and an F if above median. As of 08/24/2021, the Fund was rated against 1389 US Equity Funds in each category: Fossil Fuels, Deforestation, Gender Equality, Civilian Firearms, Prison Industrial Complex, Military Weapons and Tobacco. The ratings are subject to change.