

Verus⁷⁷⁷**Verus**

Subsidiaries: Verus Advisory
 Locations: Washington (HQ)
 Industries: Diversified Financials

RISK LEVEL:**Medium Risk****DESCRIPTION:**

Verus is Medium Risk. The company often yields to political activism in shaping corporate governance, potentially alienating consumers, dividing employees, and harming shareholders. The company implements race and identity-based policies that replace merit, excellence, and integrity with preferential treatment and outcomes. Verus occasionally embraces corporate initiatives that redirect its central focus from business goals to partisan policies and divisive issues at times. This approach fails to safeguard free exercise, free speech, and free enterprise.

Corporate Weaponization

Has canceled customers, suppliers, or vendors due to their political views or religious beliefs OR corporately boycotts, divests, or sanctions regions, people groups, or industries. Medium Risk

Verus integrates ESG into its business practices. From its Integrating ESG into Active Portfolios paper: "In this paper, we address how environmental, social, and governance (ESG) considerations are integrated into our manager research process" (1). However, the company has not canceled customers, suppliers, or vendors based on political views or religious beliefs (2).

Charitable giving (including employee matching programs) policies or practices discriminate against charitable organizations based on views or religious beliefs. Lower Risk

Verus does not appear to discriminate against charitable organizations based on views or beliefs. Verus' charitable giving focus areas are environmental awareness, sustainability practices, and educational endowments (1).

Employment policies fail to protect against viewpoint or other discrimination and/or are ideological in nature. High Risk

Verus appears to prioritize diversity over merit in its recruitment, leadership composition, and mentoring program. From its Emerging & Diverse Manager Diligence Days Page: "The Verus research teams continuously pursue emerging and diverse managers, year round, which is worked into their ongoing research agenda. The Verus Emerging and Diverse Manager Program seeks to expand its coverage of emerging and diverse managers" and "Verus is committed to further promoting diversity through our recruitment, retention, and inclusion efforts" (1)(2). Verus does not provide viewpoint protections for its employees (3).

Corporate Governance and Public Policy

Uses corporate reputation to support causes, organizations, or policies hostile to freedom of expression. High Risk

Verus supports DEI within its business practices, employing a DEI Committee (1). Verus is a signatory to the CFA Institute's Diversity, Equity, and Inclusion Code, indicating its support of DEI in its recruitment, hiring, onboarding, and promotions. Furthermore, the company pledges to integrate DEI into its policies, promote DEI in the investment industry, and provide regular reporting on its DEI metrics to the CFA Institute (2)(3)(4). The company has published multiple white papers encouraging DEI in leadership and investment (5). The company supports DEI within its business practices. From its Diversity, Equity, Inclusion page: "We are committed to promote diversity, equity, and inclusion (DEI) in our workplace and the institutional investment consulting industry as a whole, and to improve utilization of underrepresented groups in our process for sourcing investment products and strategies" (6). Verus has published multiple research papers encouraging ESG in investment strategies (7). The company is a founding member of the Institutional Investing Diversity Cooperative which promotes diversity in institutional asset managers (7)(8).

Uses corporate funds to advance ideological causes, organizations, or policies hostile to freedom of expression. High Risk

Verus is a sponsor of the Investment Diversity Advisory Council, an organization committed to engaging and encouraging stakeholders to improve diverse representation (1)(2). The company is a member of Toigo, an organization committed to diversity in finance (3)(4). Otherwise, the company has not used corporate funds to advance ideological causes, organizations, or policies (5).

Uses corporate political actions and/or financial contributions for ideological, non-business purposes. N/A

Verus does not operate a PAC or engage in lobbying at this time (1)(2)(3).

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