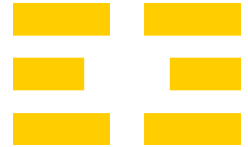


Wasatch Advisors

Locations: Utah (HQ)
 Industries: Diversified Financials

RISK LEVEL:



Medium Risk

DESCRIPTION:

Wasatch Advisors 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. Wasatch Advisors 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

Wasatch Advisors integrates ESG into its investment practices [\(1\)](#). The company is a signatory of the Principles for Responsible Investment, incorporating ESG issues into investment analysis, decision-making, and other business practices [\(1\)\(2\)](#). However, Wasatch Advisors has not canceled customers, suppliers, or vendors based on political views or religious beliefs [\(3\)](#).

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

Wasatch Advisors does not publish charitable giving guidelines [\(1\)](#).

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

Wasatch Advisors does not provide viewpoint protections for its employees [\(1\)](#).

Corporate Governance and Public Policy

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

Wasatch Advisors 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 [\(1\)](#)[\(2\)](#)[\(3\)](#)[\(4\)](#).

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

Wasatch Advisors has not used corporate funds to advance ideological causes, organizations, or policies [\(1\)](#).

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

Wasatch Advisors does not operate a PAC or engage in lobbying at this time [\(1\)](#)[\(2\)](#)[\(3\)](#).

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