On screen copy:
How can I make an impact with my investing?

Disclosure:
Please see important information at the end of the video. Screenshots are for illustration only.

What if you could make investments that have the potential to provide a financial return while also focusing on companies committed to making the world a little bit better along the way?

It’s possible, through something called Sustainable and Impact Investing. Now I say “possible” because let’s face it, all investing comes with risk.

But with that in mind, you can make investments with the potential to generate a measurable social and environmental impact while also gaining value over time... and Merrill Edge Self-Directed has ways to help you find them.

I’ll show you where to start looking on my screen, so you can do it yourself.

Once you log in to your account, you’re going to be looking for information on ESG investments -- that stands for environmental, social and governance.

So, you can choose the kind of impact that’s important to you, and invest in something that might help build the future you want to see - like a world where companies treat their workers and customers fairly and help keep our environment healthy.

On screen:
Merrill Edge® Self-Directed Login screen

But whatever your priorities are,

On screen:
Merrill Investment Dynamic Insights page
you can find your inspiration here, under “Idea Builder.”

**On screen:**
Merrill Idea Builder main page

It’s an uncluttered, intuitive way to find investing themes that might interest you.

**On screen:**
Transforming World page in Merrill Idea Builder

There are pre-screened lists of environmental leaders, and you can even search topics you’re interested in, like “water” to see choices that line up with what you’re looking for.

**On screen:**
Merrill Idea Builder search bar: water
Merrill Idea Builder search results for water

And if you find a stock or fund that aligns with your priorities, it only takes a few clicks to dig deeper. Whether you’re looking at a particular stock

**On screen:**
DRNS Stock Story Intro page for fictional stock

or a fund like this one,

**On screen:**
Showing where to find the ESG score for a stock in Stock Story

you can see an overall ESG score

**On screen:**
Showing an example of an MSCI ESG overall portfolio ESG score

or read a full ratings report from MSCI, who provide investors all over the globe with insights to better understand the potential impact of their investments.

**On screen:**
Showing an example of an MSCI ESG fund ratings report

Another feature within the fund’s story is here.

**On screen:**
Showing an ESG score chart for holdings screen
You can see each fund’s top holdings and then take a closer look at those companies to see how they rate.

**On screen:**
ESG score chart for holdings screen with fictional company’s popup

With access to tools like these, you don’t have to be a research expert to find and validate how the stocks or funds align with the impact you’d like to make.

**On screen:**
ESG Investor Snapshot page for fictional company

Merrill even has tools to help you review your current portfolio through a social and environmental lens. They help you become aware of what you own, and where opportunities may exist.

So, when you visit your portfolio’s dynamic insights page,

**On screen:**
Merrill Dynamic Insights Page

just expand your Impact Investing window

**On screen:**
Impact Investing window on Dynamic Insights page

to see what your portfolio’s overall ESG score is.

**On screen:**
Overall
6.7
out of 10

You can also click over to your portfolio story to find the ESG details for your individual holdings too.

**On screen:**
Portfolio Story for Retirement Account page

As always, additional help is just a click or call away. And if you ever decide that you’d like a bit more advice and guidance, Merrill can also connect you with an advisor to talk about other sustainable impact investing choices.
So that’s it. If you’re interested in trying to do some good for the world while you invest, now you know where to find ideas that can put your values into action.

Thanks for watching, and for choosing Merrill.

Disclosure:
Important Information
Investing involves risk. There is always the potential of losing money when you invest in securities.

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