

## VOTE SUMMARY REPORT

Date range covered : 04/01/2025 to 03/31/2026

LOCATION(S): ALL LOCATIONS

INSTITUTION ACCOUNT(S): MAWER USEF

### Carrier Global Corporation

**Meeting Date:** 04/09/2025

**Country:** USA

**Ticker:** CARR

**Record Date:** 02/13/2025

**Meeting Type:** Annual

**Primary Security ID:** 14448C104

**Shares Voted:** 212,916

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jean-Pierre Garnier	Mgmt	For	For
1b	Elect Director David L. Gitlin	Mgmt	For	For
1c	Elect Director John J. Greisch	Mgmt	For	For
1d	Elect Director Charles M. Holley, Jr.	Mgmt	For	For
1e	Elect Director Michael M. McNamara	Mgmt	For	For
1f	Elect Director Amy E. Miles	Mgmt	For	For
1g	Elect Director Susan N. Story	Mgmt	For	For
1h	Elect Director Michael A. Todman	Mgmt	For	For
1i	Elect Director Maximilian (Max) Viessmann	Mgmt	For	For
1j	Elect Director Virginia M. Wilson	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
5	Report on Lobbying Payments and Policy	SH	Against	Against

### The Sherwin-Williams Company

**Meeting Date:** 04/16/2025

**Country:** USA

**Ticker:** SHW

**Record Date:** 02/19/2025

**Meeting Type:** Annual

**Primary Security ID:** 824348106

## The Sherwin-Williams Company

Shares Voted: 158,107

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Kerrii B. Anderson	Mgmt	For	For
1b	Elect Director Jeff M. Fettig	Mgmt	For	For
1c	Elect Director Robert J. Gangort	Mgmt	For	For
1d	Elect Director Heidi G. Petz	Mgmt	For	For
1e	Elect Director Aaron M. Powell	Mgmt	For	For
1f	Elect Director Marta R. Stewart	Mgmt	For	For
1g	Elect Director Michael H. Thaman	Mgmt	For	For
1h	Elect Director Matthew Thornton, III	Mgmt	For	For
1i	Elect Director Thomas L. Williams	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Approve Omnibus Stock Plan	Mgmt	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
5	Eliminate Supermajority Vote Requirement of Paragraph (B) of Article Sixth of the Charter	Mgmt	For	For
6	Eliminate Supermajority Vote Requirement of Section 6(b) of Article Fourth, Division A of the Charter	Mgmt	For	For

## Texas Instruments Incorporated

Meeting Date: 04/17/2025

Country: USA

Ticker: TXN

Record Date: 02/20/2025

Meeting Type: Annual

Primary Security ID: 882508104

Shares Voted: 168,579

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Mark Blinn	Mgmt	For	For
1b	Elect Director Todd Bluedorn	Mgmt	For	For
1c	Elect Director Janet Clark	Mgmt	For	For
1d	Elect Director Carrie Cox	Mgmt	For	For

## Texas Instruments Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1e	Elect Director Martin Craighead	Mgmt	For	For
1f	Elect Director Reginald DesRoches	Mgmt	For	For
1g	Elect Director Curtis Farmer	Mgmt	For	For
1h	Elect Director Jean Hobby	Mgmt	For	For
1i	Elect Director Haviv Ilan	Mgmt	For	For
1j	Elect Director Ronald Kirk	Mgmt	For	For
1k	Elect Director Pamela Patsley	Mgmt	For	For
1l	Elect Director Robert Sanchez	Mgmt	For	For
1m	Elect Director Richard Templeton	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Reduce Ownership Threshold for Shareholders to Call Special Meeting	SH	Against	Against

## Bio-Rad Laboratories, Inc.

**Meeting Date:** 04/22/2025      **Country:** USA      **Ticker:** BIO  
**Record Date:** 02/24/2025      **Meeting Type:** Annual  
**Primary Security ID:** 090572207

**Shares Voted:** 135,477

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Melinda Litherland	Mgmt	For	For
1.2	Elect Director Arnold A. Pinkston	Mgmt	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For
3	Submit Severance Agreement to Shareholder Vote	SH	Against	Against

## Johnson & Johnson

**Meeting Date:** 04/24/2025      **Country:** USA      **Ticker:** JNJ  
**Record Date:** 02/25/2025      **Meeting Type:** Annual  
**Primary Security ID:** 478160104

## Johnson & Johnson

Shares Voted: 246,516

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Darius Adamczyk	Mgmt	For	For
1b	Elect Director Mary C. Beckerle	Mgmt	For	For
1c	Elect Director Jennifer A. Doudna	Mgmt	For	For
1d	Elect Director Joaquin Duato	Mgmt	For	For
1e	Elect Director Marillyn A. Hewson	Mgmt	For	For
1f	Elect Director Paula A. Johnson	Mgmt	For	For
1g	Elect Director Hubert Joly	Mgmt	For	For
1h	Elect Director Mark B. McClellan	Mgmt	For	For
1i	Elect Director Mark A. Weinberger	Mgmt	For	For
1j	Elect Director Nadja Y. West	Mgmt	For	For
1k	Elect Director Eugene A. Woods	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against
5	Oversee and Report Human Rights Impact Assessment	SH	Against	Against

## Abbott Laboratories

Meeting Date: 04/25/2025

Country: USA

Ticker: ABT

Record Date: 02/26/2025

Meeting Type: Annual

Primary Security ID: 002824100

Shares Voted: 678,812

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Robert J. Alpern	Mgmt	For	For
1.2	Elect Director Claire Babineaux-Fontenot	Mgmt	For	For
1.3	Elect Director Sally E. Blount	Mgmt	For	For
1.4	Elect Director Robert B. Ford	Mgmt	For	For
1.5	Elect Director Paola Gonzalez	Mgmt	For	For

## Abbott Laboratories

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.6	Elect Director Michelle A. Kumbier	Mgmt	For	For
1.7	Elect Director Darren W. McDew	Mgmt	For	For
1.8	Elect Director Nancy McKinstry	Mgmt	For	For
1.9	Elect Director Michael G. O'Grady	Mgmt	For	For
1.10	Elect Director Michael F. Roman	Mgmt	For	For
1.11	Elect Director Daniel J. Starks	Mgmt	For	For
1.12	Elect Director John G. Stratton	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against

## American Electric Power Company, Inc.

**Meeting Date:** 04/29/2025

**Country:** USA

**Ticker:** AEP

**Record Date:** 03/04/2025

**Meeting Type:** Annual

**Primary Security ID:** 025537101

**Shares Voted:** 589,738

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Bill Fehrman	Mgmt	For	For
1.2	Elect Director Ben Fowke	Mgmt	For	For
1.3	Elect Director Art A. Garcia	Mgmt	For	For
1.4	Elect Director Hunter C. Gary	Mgmt	For	For
1.5	Elect Director Sandra Beach Lin	Mgmt	For	For
1.6	Elect Director Henry P. Lingjinfelter	Mgmt	For	For
1.7	Elect Director Margaret M. McCarthy	Mgmt	For	For
1.8	Elect Director Daryl Roberts	Mgmt	For	For
1.9	Elect Director Joseph G. Sauvage	Mgmt	For	For
1.10	Elect Director Daniel G. Stoddard	Mgmt	For	For
1.11	Elect Director Sara Martinez Tucker	Mgmt	For	For
1.12	Elect Director Lewis Von Thær	Mgmt	For	For

## American Electric Power Company, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## BorgWarner Inc.

**Meeting Date:** 04/30/2025      **Country:** USA      **Ticker:** BWA  
**Record Date:** 03/03/2025      **Meeting Type:** Annual  
**Primary Security ID:** 099724106

**Shares Voted:** 552,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1A	Elect Director Joseph F. Fadool	Mgmt	For	For
1B	Elect Director Sara A. Greenstein	Mgmt	For	For
1C	Elect Director Michael S. Hanley	Mgmt	For	For
1D	Elect Director Shaun E. McAlmont	Mgmt	For	For
1E	Elect Director Deborah D. McWhinney	Mgmt	For	For
1F	Elect Director Alexis P. Michas	Mgmt	For	For
1G	Elect Director Sailaja K. Shankar	Mgmt	For	For
1H	Elect Director Hau N. Thai-Tang	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Amend Right to Call Special Meeting	SH	Against	Against

## BWX Technologies, Inc.

**Meeting Date:** 05/02/2025      **Country:** USA      **Ticker:** BWXT  
**Record Date:** 03/06/2025      **Meeting Type:** Annual  
**Primary Security ID:** 05605H100

## BWX Technologies, Inc.

Shares Voted: 408,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jan A. Bertsch	Mgmt	For	For
1b	Elect Director Gerhard F. Burbach	Mgmt	For	For
1c	Elect Director Rex D. Geveden	Mgmt	For	For
1d	Elect Director James M. Jaska	Mgmt	For	For
1e	Elect Director Kenneth J. Krieg	Mgmt	For	For
1f	Elect Director Leland D. Melvin	Mgmt	For	For
1g	Elect Director Barbara A. Niland	Mgmt	For	For
1h	Elect Director Nicole W. Piasecki	Mgmt	For	For
1i	Elect Director John M. Richardson	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For
4	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For

## Danaher Corporation

Meeting Date: 05/06/2025

Country: USA

Ticker: DHR

Record Date: 03/07/2025

Meeting Type: Annual

Primary Security ID: 235851102

Shares Voted: 219,774

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Rainer M. Blair	Mgmt	For	For
1b	Elect Director Feroz Dewan	Mgmt	For	For
1c	Elect Director Linda Filler	Mgmt	For	For
1d	Elect Director Charles W. Lamanna	Mgmt	For	For
1e	Elect Director Teri List	Mgmt	For	For
1f	Elect Director Jessica L. Mega	Mgmt	For	For
1g	Elect Director Mitchell P. Rales	Mgmt	For	For
1h	Elect Director Steven M. Rales	Mgmt	For	For

## Danaher Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1i	Elect Director A. Shane Sanders	Mgmt	For	For
1j	Elect Director John T. Schwieters	Mgmt	For	For
1k	Elect Director Alan G. Spoon	Mgmt	For	For
1l	Elect Director Raymond C. Stevens	Mgmt	For	For
1m	Elect Director Elias A. Zerhouni	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## The Hershey Company

Meeting Date: 05/06/2025

Country: USA

Ticker: HSY

Record Date: 03/07/2025

Meeting Type: Annual

Primary Security ID: 427866108

Shares Voted: 137,366

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Michele G. Buck	Mgmt	For	For
1b	Elect Director Timothy W. Curoe	Mgmt	For	For
1c	Elect Director Mary Kay Haben	Mgmt	For	For
1d	Elect Director Huong Maria T. Kraus	Mgmt	For	Against
1e	Elect Director Deirdre A. Mahlan	Mgmt	For	For
1f	Elect Director Barry J. Nalebuff	Mgmt	For	For
1g	Elect Director Kevin M. Ozan	Mgmt	For	For
1h	Elect Director Juan R. Perez	Mgmt	For	Against
1i	Elect Director Marie Quintero-Johnson	Mgmt	For	For
1j	Elect Director Cordel Robbin-Coker	Mgmt	For	For
1k	Elect Director Harold Singleton, III	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against

## The Hershey Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
4	Amend Certificate of Incorporation re: Stockholders' Right to Fill Vacancies	Mgmt	For	For

## AMETEK, Inc.

**Meeting Date:** 05/07/2025      **Country:** USA      **Ticker:** AME  
**Record Date:** 03/10/2025      **Meeting Type:** Annual  
**Primary Security ID:** 031100100

**Shares Voted:** 164,327

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Dean Seavers	Mgmt	For	For
1b	Elect Director David A. Zapico	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For

## AptarGroup, Inc.

**Meeting Date:** 05/07/2025      **Country:** USA      **Ticker:** ATR  
**Record Date:** 03/14/2025      **Meeting Type:** Annual  
**Primary Security ID:** 038336103

**Shares Voted:** 552,243

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Giovanna Kampouri Monnas	Mgmt	For	For
1b	Elect Director Isabel Marey-Semper	Mgmt	For	For
1c	Elect Director Stephan B. Tanda	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Omnibus Stock Plan	Mgmt	For	For
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

## S&P Global Inc.

Meeting Date: 05/07/2025

Country: USA

Ticker: SPGI

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 78409V104

Shares Voted: 75,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Marco Alvera	Mgmt	For	For
1.2	Elect Director Martina L. Cheung	Mgmt	For	For
1.3	Elect Director Jacques Esculier	Mgmt	For	For
1.4	Elect Director William D. Green	Mgmt	For	For
1.5	Elect Director Stephanie C. Hill	Mgmt	For	For
1.6	Elect Director Rebecca Jacoby	Mgmt	For	For
1.7	Elect Director Ian Paul Livingston	Mgmt	For	For
1.8	Elect Director Maria R. Morris	Mgmt	For	For
1.9	Elect Director Gregory Washington	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Amend Clawback Policy	SH	Against	Against

## CME Group Inc.

Meeting Date: 05/08/2025

Country: USA

Ticker: CME

Record Date: 03/10/2025

Meeting Type: Annual

Primary Security ID: 12572Q105

Shares Voted: 441,058

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Terrence A. Duffy	Mgmt	For	Against
1b	Elect Director Kathryn Benesh	Mgmt	For	Against
1c	Elect Director Timothy S. Bitsberger	Mgmt	For	Against
1d	Elect Director Charles P. Carey	Mgmt	For	Against
1e	Elect Director Bryan T. Durkin	Mgmt	For	Against
1f	Elect Director Harold Ford, Jr.	Mgmt	For	Against

## CME Group Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1g	Elect Director Martin J. Gepsman	Mgmt	For	Against
1h	Elect Director Daniel G. Kaye	Mgmt	For	Against
1i	Elect Director Phyllis M. Lockett	Mgmt	For	Against
1j	Elect Director Deborah J. Lucas	Mgmt	For	Against
1k	Elect Director Rahael Seifu	Mgmt	For	Against
1l	Elect Director William R. Shepard	Mgmt	For	Against
1m	Elect Director Howard J. Siegel	Mgmt	For	Against
1n	Elect Director Dennis A. Suskind	Mgmt	For	Against
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## AbbVie Inc.

Meeting Date: 05/09/2025

Country: USA

Ticker: ABBV

Record Date: 03/10/2025

Meeting Type: Annual

Primary Security ID: 00287Y109

Shares Voted: 135,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director William H.L. Burnside	Mgmt	For	For
1b	Elect Director Thomas C. Freyman	Mgmt	For	For
1c	Elect Director Brett J. Hart	Mgmt	For	For
1d	Elect Director Edward J. Rapp	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Eliminate Supermajority Vote Requirement	Mgmt	For	For
5	Adopt Simple Majority Vote	SH	Against	For

## AAON, Inc.

Meeting Date: 05/13/2025

Country: USA

Ticker: AAON

Record Date: 03/14/2025

Meeting Type: Annual

Primary Security ID: 000360206

Shares Voted: 287,100

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director A.H. ("Chip") McElroy, II	Mgmt	For	For
1b	Elect Director Bruce Ware	Mgmt	For	For
2	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Arthur J. Gallagher & Co.

Meeting Date: 05/13/2025

Country: USA

Ticker: AJG

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 363576109

Shares Voted: 378,541

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Sherry Barrat	Mgmt	For	For
1b	Elect Director Deborah Caplan	Mgmt	For	For
1c	Elect Director Teresa Clarke	Mgmt	For	For
1d	Elect Director John Coldman	Mgmt	For	For
1e	Elect Director Richard Harries	Mgmt	For	For
1f	Elect Director Pat Gallagher	Mgmt	For	For
1g	Elect Director David Johnson	Mgmt	For	For
1h	Elect Director Chris Miskel	Mgmt	For	For
1i	Elect Director Ralph Nicoletti	Mgmt	For	For
1j	Elect Director Norman Rosenthal	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## State Street Corporation

Meeting Date: 05/14/2025

Country: USA

Ticker: STT

Record Date: 03/14/2025

Meeting Type: Annual

Primary Security ID: 857477103

Shares Voted: 268,535

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Marie A. Chandoha	Mgmt	For	For
1b	Elect Director DonnaLee A. DeMaio	Mgmt	For	For
1c	Elect Director Amelia C. Fawcett	Mgmt	For	For
1d	Elect Director William C. Freda	Mgmt	For	For
1e	Elect Director Patricia M. Halliday	Mgmt	For	For
1f	Elect Director Sara Mathew	Mgmt	For	For
1g	Elect Director William L. Meaney	Mgmt	For	For
1h	Elect Director Ronald P. O'Hanley	Mgmt	For	For
1i	Elect Director Sean P. O'Sullivan	Mgmt	For	For
1j	Elect Director Julio A. Portalatin	Mgmt	For	For
1k	Elect Director John B. Rhea	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Require Independent Board Chair	SH	Against	For
5	Report on "Just Transition"	SH	Against	Against

## Amphenol Corporation

Meeting Date: 05/15/2025

Country: USA

Ticker: APH

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 032095101

Shares Voted: 2,101,196

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Nancy A. Altobello	Mgmt	For	For
1.2	Elect Director David P. Falck	Mgmt	For	For

## Amphenol Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.3	Elect Director Rita S. Lane	Mgmt	For	For
1.4	Elect Director Robert A. Livingston	Mgmt	For	For
1.5	Elect Director Martin H. Loeffler	Mgmt	For	For
1.6	Elect Director R. Adam Norwitt	Mgmt	For	For
1.7	Elect Director Prahlad Singh	Mgmt	For	For
1.8	Elect Director Anne Clarke Wolff	Mgmt	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Increase Authorized Common Stock	Mgmt	For	For
5	Amend Right to Call Special Meeting	SH	Against	Against

## CVS Health Corporation

Meeting Date: 05/15/2025

Country: USA

Ticker: CVS

Record Date: 03/17/2025

Meeting Type: Annual

Primary Security ID: 126650100

Shares Voted: 480,000

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Fernando Aguirre	Mgmt	For	For
1b	Elect Director Jeffrey R. Balsler	Mgmt	For	For
1c	Elect Director C. David Brown, II	Mgmt	For	For
1d	Elect Director Alecia A. DeCoudreaux	Mgmt	For	For
1e	Elect Director Roger N. Farah	Mgmt	For	For
1f	Elect Director Anne M. Finucane	Mgmt	For	For
1g	Elect Director J. David Joyner	Mgmt	For	For
1h	Elect Director J. Scott Kirby	Mgmt	For	For
1i	Elect Director Michael F. Mahoney	Mgmt	For	For
1j	Elect Director Leslie V. Norwalk	Mgmt	For	For
1k	Elect Director Larry M. Robbins	Mgmt	For	For

## CVS Health Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1l	Elect Director Guy P. Sansone	Mgmt	For	For
1m	Elect Director Douglas H. Shulman	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
4	Reduce Ownership Threshold for Shareholders to Request Action by Written Consent	SH	Against	Against

## Marsh & McLennan Companies, Inc.

**Meeting Date:** 05/15/2025      **Country:** USA      **Ticker:** MMC  
**Record Date:** 03/17/2025      **Meeting Type:** Annual  
**Primary Security ID:** 571748102

Shares Voted: 546,720

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Anthony K. Anderson	Mgmt	For	For
1b	Elect Director John Q. Doyle	Mgmt	For	For
1c	Elect Director H. Edward Hanway	Mgmt	For	For
1d	Elect Director Judith Hartmann	Mgmt	For	For
1e	Elect Director Deborah C. Hopkins	Mgmt	For	For
1f	Elect Director Tamara Ingram	Mgmt	For	For
1g	Elect Director Jane H. Lute	Mgmt	For	For
1h	Elect Director Steven A. Mills	Mgmt	For	Against
1i	Elect Director Morton O. Schapiro	Mgmt	For	For
1j	Elect Director Jan Siegmund	Mgmt	For	For
1k	Elect Director Lloyd M. Yates	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For

## Martin Marietta Materials, Inc.

Meeting Date: 05/15/2025

Country: USA

Ticker: MLM

Record Date: 03/07/2025

Meeting Type: Annual

Primary Security ID: 573284106

Shares Voted: 143,251

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Dorothy M. Ables	Mgmt	For	For
1.2	Elect Director Sue W. Cole	Mgmt	For	For
1.3	Elect Director Anthony R. Foxx	Mgmt	For	For
1.4	Elect Director John J. Koraleski	Mgmt	For	For
1.5	Elect Director Mary T. Mack	Mgmt	For	For
1.6	Elect Director C. Howard Nye	Mgmt	For	For
1.7	Elect Director Laree E. Perez	Mgmt	For	For
1.8	Elect Director Thomas H. Pike	Mgmt	For	For
1.9	Elect Director Donald W. Slager	Mgmt	For	For
1.10	Elect Director David C. Wajsgras	Mgmt	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Approve Qualified Employee Stock Purchase Plan	Mgmt	For	For

## Intercontinental Exchange, Inc.

Meeting Date: 05/16/2025

Country: USA

Ticker: ICE

Record Date: 03/20/2025

Meeting Type: Annual

Primary Security ID: 45866F104

Shares Voted: 482,684

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Sharon Y. Bowen	Mgmt	For	For
1b	Elect Director Shantella E. Cooper	Mgmt	For	For
1c	Elect Director Duriya M. Farooqui	Mgmt	For	For
1d	Elect Director The Right Hon. the Lord Hague of Richmond	Mgmt	For	For
1e	Elect Director Mark F. Mulhern	Mgmt	For	For

## Intercontinental Exchange, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1f	Elect Director Thomas E. Noonan	Mgmt	For	For
1g	Elect Director Caroline L. Silver	Mgmt	For	For
1h	Elect Director Jeffrey C. Sprecher	Mgmt	For	For
1i	Elect Director Judith A. Sprieser	Mgmt	For	For
1j	Elect Director Martha A. Tirinnanzi	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Amend Certificate of Incorporation to Extend Voting Limitations	Mgmt	For	For
4	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For

## JPMorgan Chase & Co.

**Meeting Date:** 05/20/2025

**Country:** USA

**Ticker:** JPM

**Record Date:** 03/21/2025

**Meeting Type:** Annual

**Primary Security ID:** 46625H100

**Shares Voted:** 205,726

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Linda B. Bammann	Mgmt	For	For
1b	Elect Director Michele G. Buck	Mgmt	For	For
1c	Elect Director Stephen B. Burke	Mgmt	For	For
1d	Elect Director Todd A. Combs	Mgmt	For	For
1e	Elect Director Alicia Boler Davis	Mgmt	For	For
1f	Elect Director James Dimon	Mgmt	For	For
1g	Elect Director Alex Gorsky	Mgmt	For	For
1h	Elect Director Mellody Hobson	Mgmt	For	For
1i	Elect Director Phebe N. Novakovic	Mgmt	For	For
1j	Elect Director Virginia M. Rometty	Mgmt	For	For
1k	Elect Director Brad D. Smith	Mgmt	For	For
1l	Elect Director Mark A. Weinberger	Mgmt	For	For

## JPMorgan Chase & Co.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Require Independent Board Chair	SH	Against	Against
5	Report on Social Impacts of Climate Transition Finance	SH	Against	Against

## Tradeweb Markets Inc.

**Meeting Date:** 05/20/2025      **Country:** USA      **Ticker:** TW  
**Record Date:** 03/24/2025      **Meeting Type:** Annual  
**Primary Security ID:** 892672106

**Shares Voted:** 202,856

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Steven Berns	Mgmt	For	For
1.2	Elect Director William (Billy) Hult	Mgmt	For	For
1.3	Elect Director Lisa Opoku	Mgmt	For	For
1.4	Elect Director Rana Yared	Mgmt	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Verisk Analytics, Inc.

**Meeting Date:** 05/20/2025      **Country:** USA      **Ticker:** VRSK  
**Record Date:** 03/24/2025      **Meeting Type:** Annual  
**Primary Security ID:** 92345Y106

**Shares Voted:** 183,169

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jeffrey Dailey	Mgmt	For	For
1b	Elect Director Bruce Hansen	Mgmt	For	For
1c	Elect Director Gregory Hendrick	Mgmt	For	For
1d	Elect Director Kathleen A. Hogenson	Mgmt	For	For

## Verisk Analytics, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1e	Elect Director Samuel G. Liss	Mgmt	For	For
1f	Elect Director Christopher J. Perry	Mgmt	For	For
1g	Elect Director Sabra R. Purtil	Mgmt	For	For
1h	Elect Director Lee M. Shavel	Mgmt	For	For
1i	Elect Director Olumide Soroye	Mgmt	For	For
1j	Elect Director Kimberly S. Stevenson	Mgmt	For	For
1k	Elect Director Therese M. Vaughan	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Eliminate Supermajority Vote Requirement for Limitation on Beneficial Ownership of the Company	Mgmt	For	For
5	Eliminate Supermajority Vote Requirement for Certain Business Combinations	Mgmt	For	For
6	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For
7	Provide Right to Call a Special Meeting at a 25 Percent Ownership Threshold	Mgmt	For	For
8	Provide Right to Call a Special Meeting at a 10 Percent Ownership Threshold	SH	Against	Against

## Amazon.com, Inc.

**Meeting Date:** 05/21/2025

**Country:** USA

**Ticker:** AMZN

**Record Date:** 03/27/2025

**Meeting Type:** Annual

**Primary Security ID:** 023135106

**Shares Voted:** 489,427

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Jeffrey P. Bezos	Mgmt	For	For
1b	Elect Director Andrew R. Jassy	Mgmt	For	For
1c	Elect Director Keith B. Alexander	Mgmt	For	For
1d	Elect Director Edith W. Cooper	Mgmt	For	For

## Amazon.com, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1e	Elect Director Jamie S. Gorelick	Mgmt	For	For
1f	Elect Director Daniel P. Huttenlocher	Mgmt	For	For
1g	Elect Director Andrew Y. Ng	Mgmt	For	For
1h	Elect Director Indra K. Nooyi	Mgmt	For	For
1i	Elect Director Jonathan J. Rubinstein	Mgmt	For	For
1j	Elect Director Brad D. Smith	Mgmt	For	For
1k	Elect Director Patricia Q. Stonesifer	Mgmt	For	For
1l	Elect Director Wendell P. Weeks	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Adopt Mandatory Policy Separating the Roles of CEO and Board Chair	SH	Against	Against
5	Report on Risks of Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against
6	Disclose All Material Scope 3 Emissions	SH	Against	Against
7	Report on Impact of Data Centers on Climate Commitments	SH	Against	Against
8	Commission Third Party Assessment of Board Oversight of Human Rights Risks of AI	SH	Against	Against
9	Report on Efforts to Reduce Plastic Packaging	SH	Against	Against
10	Commission Independent Audit and Report on Warehouse Working Conditions	SH	Against	Against
11	Report on Unethical Use of External Data in Development of AI Products	SH	Against	Against

## ITT Inc.

**Meeting Date:** 05/21/2025

**Country:** USA

**Ticker:** ITT

**Record Date:** 03/25/2025

**Meeting Type:** Annual

**Primary Security ID:** 45073V108

Shares Voted: 172,400

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Kevin Berryman	Mgmt	For	For
1b	Elect Director Maggie Chu	Mgmt	For	For
1c	Elect Director Donald DeFosset, Jr.	Mgmt	For	For
1d	Elect Director Douglas G. DelGrosso	Mgmt	For	For
1e	Elect Director Nazzic S. Keene	Mgmt	For	For
1f	Elect Director Rebecca A. McDonald	Mgmt	For	For
1g	Elect Director Christopher O'Shea	Mgmt	For	For
1h	Elect Director Timothy H. Powers	Mgmt	For	For
1i	Elect Director Luca Savi	Mgmt	For	For
1j	Elect Director Sharon Szafranski	Mgmt	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## The Southern Company

Meeting Date: 05/21/2025

Country: USA

Ticker: SO

Record Date: 03/31/2025

Meeting Type: Annual

Primary Security ID: 842587107

Shares Voted: 450,446

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Janaki Akella	Mgmt	For	For
1b	Elect Director Shantella E. Cooper	Mgmt	For	For
1c	Elect Director Anthony F. "Tony" Earley, Jr.	Mgmt	For	For
1d	Elect Director James O. "Jimmy" Etheredge	Mgmt	For	For
1e	Elect Director David J. Grain	Mgmt	For	For
1f	Elect Director Donald M. James	Mgmt	For	For
1g	Elect Director John D. Johns	Mgmt	For	For

## The Southern Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1h	Elect Director Dale E. Klein	Mgmt	For	For
1i	Elect Director David E. Meador	Mgmt	For	For
1j	Elect Director William G. Smith, Jr.	Mgmt	For	For
1k	Elect Director Kristine L. Svinicki	Mgmt	For	For
1l	Elect Director Lizanne Thomas	Mgmt	For	For
1m	Elect Director Christopher C. Womack	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Reduce Supermajority Vote Requirement	Mgmt	For	For
5	Adopt Simple Majority Vote	SH	Against	For
6	Disclose Assumptions Underlying Increased Reliance on Fossil Fuel-Based Energy Production	SH	Against	Against
7	Report on Net Zero Activities	SH	Against	Against
8	Report on Civil Rights and Non-Discrimination Audit	SH	Against	Against

## Verizon Communications Inc.

**Meeting Date:** 05/22/2025      **Country:** USA      **Ticker:** VZ  
**Record Date:** 03/24/2025      **Meeting Type:** Annual  
**Primary Security ID:** 92343V104

**Shares Voted:** 2,340,159

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Shellye Archambeau	Mgmt	For	For
1.2	Elect Director Roxanne Austin	Mgmt	For	For
1.3	Elect Director Mark Bertolini	Mgmt	For	For
1.4	Elect Director Vittorio Colao	Mgmt	For	For
1.5	Elect Director Caroline Litchfield	Mgmt	For	For
1.6	Elect Director Laxman Narasimhan	Mgmt	For	For
1.7	Elect Director Clarence Otis, Jr.	Mgmt	For	For

## Verizon Communications Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.8	Elect Director Daniel Schulman	Mgmt	For	For
1.9	Elect Director Carol Tome	Mgmt	For	For
1.10	Elect Director Hans Vestberg	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Report on Climate Lobbying	SH	Against	Against
5	Report on Potential Hazards of Lead Cables and Potential Remediation Costs	SH	Against	Against
6	Report on Risks Related to Discrimination Against Ad Buyers and Sellers Based on Religious/Political Views	SH	Against	Against

## Waters Corporation

**Meeting Date:** 05/22/2025

**Country:** USA

**Ticker:** WAT

**Record Date:** 03/24/2025

**Meeting Type:** Annual

**Primary Security ID:** 941848103

**Shares Voted:** 228,658

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Flemming Ornskov	Mgmt	For	For
1.2	Elect Director Linda Baddour	Mgmt	For	For
1.3	Elect Director Udit Batra	Mgmt	For	For
1.4	Elect Director Dan Brennan	Mgmt	For	For
1.5	Elect Director Richard Fearon	Mgmt	For	For
1.6	Elect Director Pearl S. Huang	Mgmt	For	For
1.7	Elect Director Wei Jiang	Mgmt	For	For
1.8	Elect Director Heather Knight	Mgmt	For	For
1.9	Elect Director Christopher A. Kuebler	Mgmt	For	For
1.10	Elect Director Mark Vergnano	Mgmt	For	For
2	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

# Waters Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
4	Amend Qualified Employee Stock Purchase Plan	Mgmt	For	For

# Ryan Specialty Holdings, Inc.

Meeting Date: 05/30/2025

Country: USA

Ticker: RYAN

Record Date: 04/01/2025

Meeting Type: Annual

Primary Security ID: 78351F107

Shares Voted: 259,574

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Henry S. Bienen	Mgmt	For	For
1.2	Elect Director Michael D. O'Halleran	Mgmt	For	Withhold
1.3	Elect Director Timothy W. Turner	Mgmt	For	For
1.4	Elect Director Patrick G. Ryan, Jr.	Mgmt	For	Withhold
2	Declassify the Board of Directors	Mgmt	For	For
3	Adopt Majority Voting for Uncontested Election of Directors	Mgmt	For	For
4	Eliminate Supermajority Vote Requirement to Remove Directors	Mgmt	For	For
5	Amend Certificate of Incorporation to Provide a Specific Outside Date to Sunset the High Vote of the Class B Common Stock	Mgmt	For	For
6	Provide Right to Act by Written Consent	Mgmt	For	For
7	Provide Right to Call Special Meeting	Mgmt	For	For
8	Eliminate Supermajority Vote Requirements to Amend Bylaws and Certain Provisions of the Certificate	Mgmt	For	For
9	Amend Certificate of Incorporation to Provide for the Exculpation of Officers	Mgmt	For	Against
10	Amend Certificate of Incorporation to Incorporate Certain Non-Substantive Amendments	Mgmt	For	For
11	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For

## Ryan Specialty Holdings, Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
12	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## UnitedHealth Group Incorporated

**Meeting Date:** 06/02/2025      **Country:** USA      **Ticker:** UNH  
**Record Date:** 04/04/2025      **Meeting Type:** Annual  
**Primary Security ID:** 91324P102

**Shares Voted:** 179,891

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Charles Baker	Mgmt	For	For
1b	Elect Director Timothy Flynn	Mgmt	For	For
1c	Elect Director Paul Garcia	Mgmt	For	For
1d	Elect Director Kristen Gil	Mgmt	For	For
1e	Elect Director Stephen Hemsley	Mgmt	For	For
1f	Elect Director Michele Hooper	Mgmt	For	For
1g	Elect Director F. William McNabb, III	Mgmt	For	For
1h	Elect Director Valerie Montgomery Rice	Mgmt	For	For
1i	Elect Director John Noseworthy	Mgmt	For	For
1j	Elect Director Andrew Witty *Withdrawn Resolution*	Mgmt		
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	Against
4	Submit Severance Agreement to Shareholder Vote	SH	Against	Against

## FTI Consulting, Inc.

**Meeting Date:** 06/04/2025      **Country:** USA      **Ticker:** FCN  
**Record Date:** 03/06/2025      **Meeting Type:** Annual  
**Primary Security ID:** 302941109

Shares Voted: 416,168

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Mark S. Bartlett	Mgmt	For	For
1b	Elect Director Elsy Boglioli	Mgmt	For	For
1c	Elect Director Claudio Costamagna	Mgmt	For	For
1d	Elect Director Nicholas C. Fanandakis	Mgmt	For	For
1e	Elect Director Steven H. Gunby	Mgmt	For	For
1f	Elect Director Stephen C. Robinson	Mgmt	For	For
1g	Elect Director Lauren E. Seeger	Mgmt	For	For
1h	Elect Director Eric T. Steigerwalt	Mgmt	For	For
1i	Elect Director Janet H. Zelenka	Mgmt	For	For
2	Ratify KPMG LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For

**Mastercard Incorporated**

Meeting Date: 06/24/2025

Country: USA

Ticker: MA

Record Date: 04/25/2025

Meeting Type: Annual

Primary Security ID: 57636Q104

Shares Voted: 154,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Merit E. Janow	Mgmt	For	For
1b	Elect Director Candido Bracher	Mgmt	For	For
1c	Elect Director Richard K. Davis	Mgmt	For	For
1d	Elect Director Julius Genachowski	Mgmt	For	For
1e	Elect Director Choon Phong Goh	Mgmt	For	For
1f	Elect Director Oki Matsumoto	Mgmt	For	For
1g	Elect Director Michael Miebach	Mgmt	For	For
1h	Elect Director Youngme Moon	Mgmt	For	For

## Mastercard Incorporated

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1i	Elect Director Rima Qureshi	Mgmt	For	For
1j	Elect Director Gabrielle Sulzberger	Mgmt	For	For
1k	Elect Director Harit Talwar	Mgmt	For	For
1l	Elect Director Lance Uggla	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Officers	Mgmt	For	For
5	Amend Articles of Incorporation to Remove Industry Director Concept	Mgmt	For	For
6	Amend Certificate of Incorporation	Mgmt	For	For
7	Oversee and Report on a Racial Equity Audit	SH	Against	Against
8	Report on Discrimination Risks of Affirmative Action Initiatives	SH	Against	Against

## Aon Plc

**Meeting Date:** 06/27/2025      **Country:** Ireland      **Ticker:** AON  
**Record Date:** 04/11/2025      **Meeting Type:** Annual  
**Primary Security ID:** G0403H108

**Shares Voted:** 38,600

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director Lester B. Knight	Mgmt	For	For
1.2	Elect Director Gregory C. Case	Mgmt	For	For
1.3	Elect Director Jose Antonio Alvarez	Mgmt	For	For
1.4	Elect Director Jin-Yong Cai	Mgmt	For	For
1.5	Elect Director Jeffrey C. Campbell	Mgmt	For	For
1.6	Elect Director Cheryl A. Francis	Mgmt	For	For
1.7	Elect Director Adriana Karaboutis	Mgmt	For	For
1.8	Elect Director Richard C. Notebaert	Mgmt	For	For
1.9	Elect Director Gloria Santona	Mgmt	For	For

## Aon Plc

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.10	Elect Director Sarah E. Smith	Mgmt	For	For
1.11	Elect Director Byron O. Spruell	Mgmt	For	For
1.12	Elect Director James G. Stavridis	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
4	Ratify Ernst & Young Chartered Accountants as Statutory Auditor	Mgmt	For	For
5	Authorize the Audit Committee to Fix Remuneration of Auditors	Mgmt	For	For
6	Authorise Issue of Equity	Mgmt	For	For
7	Authorise Issue of Equity without Pre-emptive Rights	Mgmt	For	For
8	Amend Omnibus Stock Plan	Mgmt	For	For

## NIKE, Inc.

Meeting Date: 09/09/2025

Country: USA

Ticker: NKE

Record Date: 07/09/2025

Meeting Type: Annual

Primary Security ID: 654106103

Shares Voted: 515,300

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Mónica Gil	Mgmt	For	For
1b	Elect Director John Rogers, Jr.	Mgmt	For	For
1c	Elect Director Robert Swan	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For

## Paychex, Inc.

Meeting Date: 10/09/2025

Country: USA

Ticker: PAYX

Record Date: 08/11/2025

Meeting Type: Annual

Primary Security ID: 704326107

**Shares Voted:** 168,838

<b>Proposal Number</b>	<b>Proposal Text</b>	<b>Proponent</b>	<b>Mgmt Rec</b>	<b>Vote Instruction</b>
1a	Elect Director Martin Mucci	Mgmt	For	For
1b	Elect Director Thomas F. Bonadio	Mgmt	For	For
1c	Elect Director Joseph G. Doody	Mgmt	For	For
1d	Elect Director John B. Gibson	Mgmt	For	For
1e	Elect Director Pamela A. Joseph	Mgmt	For	For
1f	Elect Director Theresa M. Payton	Mgmt	For	For
1g	Elect Director Kevin A. Price	Mgmt	For	For
1h	Elect Director Joseph M. Tucci	Mgmt	For	For
1i	Elect Director Joseph M. Velli	Mgmt	For	For
1j	Elect Director Kara Wilson	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

**The Procter & Gamble Company**

**Meeting Date:** 10/14/2025      **Country:** USA      **Ticker:** PG  
**Record Date:** 08/15/2025      **Meeting Type:** Annual  
**Primary Security ID:** 742718109

**Shares Voted:** 414,446

<b>Proposal Number</b>	<b>Proposal Text</b>	<b>Proponent</b>	<b>Mgmt Rec</b>	<b>Vote Instruction</b>
1a	Elect Director B. Marc Allen	Mgmt	For	For
1b	Elect Director Craig Arnold	Mgmt	For	For
1c	Elect Director Brett Biggs	Mgmt	For	For
1d	Elect Director Sheila Bonini	Mgmt	For	For
1e	Elect Director Amy L. Chang	Mgmt	For	For
1f	Elect Director Shailesh Jejurikar	Mgmt	For	For
1g	Elect Director Joseph Jimenez	Mgmt	For	For
1h	Elect Director Christopher Kempczinski	Mgmt	For	For
1i	Elect Director Debra L. Lee	Mgmt	For	For

# The Procter & Gamble Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1j	Elect Director Christine M. McCarthy	Mgmt	For	For
1k	Elect Director Ashley McEvoy	Mgmt	For	For
1l	Elect Director Jon R. Moeller	Mgmt	For	For
1m	Elect Director Robert J. Portman	Mgmt	For	For
1n	Elect Director Rajesh Subramaniam	Mgmt	For	For
2	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For
5	Report on Efforts to Reduce Plastic Use	SH	Against	Against

# CACI International Inc.

**Meeting Date:** 10/16/2025

**Country:** USA

**Ticker:** CACI

**Record Date:** 08/25/2025

**Meeting Type:** Annual

**Primary Security ID:** 127190304

**Shares Voted:** 84,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Lisa S. Disbrow	Mgmt	For	For
1b	Elect Director Susan M. Gordon	Mgmt	For	For
1c	Elect Director William L. Jews	Mgmt	For	For
1d	Elect Director Ryan D. McCarthy	Mgmt	For	For
1e	Elect Director John S. Mengucci	Mgmt	For	For
1f	Elect Director Scott C. Morrison	Mgmt	For	For
1g	Elect Director Philip O. Nolan	Mgmt	For	For
1h	Elect Director Debora A. Plunkett	Mgmt	For	For
1i	Elect Director Stanton D. Sloane	Mgmt	For	For
1j	Elect Director Charles L. Szews	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Approve Omnibus Stock Plan	Mgmt	For	For

## CACI International Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
4	Ratify PricewaterhouseCoopers LLP as Auditors	Mgmt	For	For

## Microsoft Corporation

**Meeting Date:** 12/05/2025      **Country:** USA      **Ticker:** MSFT  
**Record Date:** 09/30/2025      **Meeting Type:** Annual  
**Primary Security ID:** 594918104

**Shares Voted:** 266,485

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Reid G. Hoffman	Mgmt	For	For
1b	Elect Director Hugh F. Johnston	Mgmt	For	For
1c	Elect Director Teri L. List	Mgmt	For	For
1d	Elect Director Catherine MacGregor	Mgmt	For	For
1e	Elect Director Mark A. L. Mason	Mgmt	For	For
1f	Elect Director Satya Nadella	Mgmt	For	For
1g	Elect Director Sandra E. Peterson	Mgmt	For	For
1h	Elect Director Penny S. Pritzker	Mgmt	For	For
1i	Elect Director John David Rainey	Mgmt	For	For
1j	Elect Director Charles W. Scharf	Mgmt	For	For
1k	Elect Director John W. Stanton	Mgmt	For	For
1l	Elect Director Emma N. Walmsley	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Deloitte & Touche LLP as Auditors	Mgmt	For	For
4	Approve Omnibus Stock Plan	Mgmt	For	For
5	Report on Risks of Microsoft's ESP being Utilized for Censorship of Legitimate Speech	SH	Against	Against
6	Report on Risks of Censorship in Generative Artificial Intelligence	SH	Against	Against
7	Report on AI Data Usage Oversight	SH	Against	Against

## Microsoft Corporation

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
8	Report on Risks of Operating in Countries with Significant Human Rights Concerns	SH	Against	For
9	Human Rights Risk Assessment	SH	Against	For
10	Report on Risks of Using Artificial Intelligence and Machine Learning Tools for Oil and Gas Development and Production	SH	Against	Against

## OSI Systems, Inc.

**Meeting Date:** 12/11/2025      **Country:** USA      **Ticker:** OSIS  
**Record Date:** 10/15/2025      **Meeting Type:** Annual  
**Primary Security ID:** 671044105

**Shares Voted:** 218,500

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Deepak Chopra	Mgmt	For	For
1b	Elect Director Ajay Mehra	Mgmt	For	For
1c	Elect Director William F. Ballhaus	Mgmt	For	For
1d	Elect Director Kelli Bernard	Mgmt	For	For
1e	Elect Director Gerald Chizever	Mgmt	For	For
1f	Elect Director James B. Hawkins	Mgmt	For	For
2	Ratify Grant Thornton LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For

## Becton, Dickinson and Company

**Meeting Date:** 01/27/2026      **Country:** USA      **Ticker:** BDX  
**Record Date:** 12/08/2025      **Meeting Type:** Annual  
**Primary Security ID:** 075887109

**Shares Voted:** 190,568

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.1	Elect Director William M. Brown	Mgmt	For	For

## Becton, Dickinson and Company

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1.2	Elect Director Carrie L. Byington	Mgmt	For	For
1.3	Elect Director R. Andrew Eckert	Mgmt	For	For
1.4	Elect Director Claire M. Fraser	Mgmt	For	For
1.5	Elect Director Gregory J. Hayes	Mgmt	For	For
1.6	Elect Director Jeffrey W. Henderson	Mgmt	For	For
1.7	Elect Director Robert L. Huffines	Mgmt	For	For
1.8	Elect Director Christopher Jones	Mgmt	For	For
1.9	Elect Director Thomas E. Polen	Mgmt	For	For
1.10	Elect Director Timothy M. Ring	Mgmt	For	For
1.11	Elect Director Bertram L. Scott	Mgmt	For	For
1.12	Elect Director Joanne Waldstreicher	Mgmt	For	For
1.13	Elect Director Jacqueline Wright	Mgmt	For	For
2	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For
3	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
4	Amend Omnibus Stock Plan	Mgmt	For	For

## Visa Inc.

**Meeting Date:** 01/27/2026

**Country:** USA

**Ticker:** V

**Record Date:** 12/01/2025

**Meeting Type:** Annual

**Primary Security ID:** 92826C839

**Shares Voted:** 261,983

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Lloyd A. Carney	Mgmt	For	For
1b	Elect Director Kermit R. Crawford	Mgmt	For	For
1c	Elect Director Francisco Javier Fernández-Carbajal	Mgmt	For	For
1d	Elect Director Teri L. List	Mgmt	For	For
1e	Elect Director John F. Lundgren	Mgmt	For	For
1f	Elect Director Ryan McInerney	Mgmt	For	For

## Visa Inc.

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1g	Elect Director Denise M. Morrison	Mgmt	For	For
1h	Elect Director Pamela Murphy	Mgmt	For	For
1i	Elect Director William Ready	Mgmt	For	For
1j	Elect Director Linda J. Rendle	Mgmt	For	For
1k	Elect Director Maynard G. Webb, Jr.	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Ratify KPMG LLP as Auditors	Mgmt	For	For
4	Amend Certificate of Incorporation to Limit the Liability of Certain Officers	Mgmt	For	For
5	Require Independent Board Chair	SH	Against	Against
6	Provide Right to Act by Written Consent	SH	Against	For
7	Report on AI-Driven Online Sexual Exploitation	SH	Against	Against
8	Report on the Return on Investment of the Company's Inclusion Programs	SH	Against	Against

## Waters Corporation

**Meeting Date:** 01/27/2026

**Country:** USA

**Ticker:** WAT

**Record Date:** 12/19/2025

**Meeting Type:** Special

**Primary Security ID:** 941848103

**Shares Voted:** 229,637

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1	Issue Shares in Connection with Merger	Mgmt	For	For
2	Adjourn Meeting	Mgmt	For	For

## Accenture Plc

**Meeting Date:** 01/28/2026

**Country:** Ireland

**Ticker:** ACN

**Record Date:** 12/01/2025

**Meeting Type:** Annual

**Primary Security ID:** G1151C101

Shares Voted: 50,793

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Martin Bruder Müller	Mgmt	For	For
1b	Elect Director Alan Jope	Mgmt	For	For
1c	Elect Director Nancy McKinstry	Mgmt	For	For
1d	Elect Director Jennifer Nason	Mgmt	For	For
1e	Elect Director Paula A. Price	Mgmt	For	For
1f	Elect Director Venkata (Murthy) Renduchintala	Mgmt	For	For
1g	Elect Director Arun Sarin	Mgmt	For	For
1h	Elect Director Julie Sweet	Mgmt	For	For
1i	Elect Director Tracey T. Travis	Mgmt	For	For
1j	Elect Director Masahiko Uotani	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	Against
3	Amend Omnibus Stock Plan	Mgmt	For	For
4	Ratify KPMG LLP as Auditors and Authorise Their Remuneration	Mgmt	For	Against
5	Authorize Board to Issue Shares under Irish Law	Mgmt	For	For
6	Authorize the Board's Authority to Opt-Out of Statutory Pre-Emptions Rights Under Irish Law	Mgmt	For	For
7	Determine Price Range for Reissuance of Treasury Shares	Mgmt	For	For

Cencora, Inc.

Meeting Date: 03/05/2026

Country: USA

Ticker: COR

Record Date: 01/12/2026

Meeting Type: Annual

Primary Security ID: 03073E105

Shares Voted: 253,356

Proposal Number	Proposal Text	Proponent	Mgmt Rec	Vote Instruction
1a	Elect Director Werner Baumann	Mgmt	For	For
1b	Elect Director Frank K. Clyburn	Mgmt	For	For
1c	Elect Director Ellen G. Cooper	Mgmt	For	For

<b>Proposal Number</b>	<b>Proposal Text</b>	<b>Proponent</b>	<b>Mgmt Rec</b>	<b>Vote Instruction</b>
1d	Elect Director D. Mark Durcan	Mgmt	For	For
1e	Elect Director Lon R. Greenberg	Mgmt	For	For
1f	Elect Director Lorence H. Kim	Mgmt	For	For
1g	Elect Director Robert P. Mauch	Mgmt	For	For
1h	Elect Director Redonda G. Miller	Mgmt	For	For
1i	Elect Director Dennis M. Nally	Mgmt	For	For
1j	Elect Director Lori J. Ryerkerk	Mgmt	For	For
1k	Elect Director Lauren M. Tyler	Mgmt	For	For
2	Advisory Vote to Ratify Named Executive Officers' Compensation	Mgmt	For	For
3	Ratify Ernst & Young LLP as Auditors	Mgmt	For	For