

“More than 1,300 public companies are constantly being screened by Fidelis.”

What is Fidelis

Fidelis International Institute is a non-profit organization devoted to research & promotion of ethics. We are present in 5 countries with a multinational, cross-cultural team.

Fidelis actively promotes the notion that strong ethics, based on solid values are essential to businesses, to the economy, and ultimately, to the wellbeing of society and of human beings around the globe.

FIDELIS PROMOTES ETHICS THROUGH FOUR MAIN AREAS OF KNOWLEDGE:

Applied Research

We offer ethical advisory services for corporations; we advice with difficult investment decisions, M&A and Private Equity deals. Fidelis gives recommendations on ethical dilemmas of all sorts.

EDUCATION

We offer lectures, courses and academic programs in the field of ethics. We develop educational programs for different types of audiences and institutions.

RESEARCH

We develop and sponsor research in various areas related to ethics, and the application of ethics, in businesses and organizations.

PUBLISHING

We generate knowledge and communicate it through articles, newsletters, and books in the field of business ethics.

Fidelis believes that ethics should no longer be disconnected to the way business is done around the world. We at Fidelis are called to instill ethics inside corporations and institutions solidly grounded on our core values.

Ethical Screening Services

Fidelis analyses companies with a detailed methodology to determine its ethical compliance according to four ethical principles and nine evaluation criteria. We generate lists of companies in which investors are advised to be cautious, to avoid completely, or to feel confident they can invest in them.

Through our robust methodology we screen securities (equities and other securities), guaranteeing investors that their ethical principles are not being compromised when they make investment decisions.

FIDELIS INTERNATIONAL INSTITUTE TEAM

ANALYST AND CONSULTANT TEAM

MEXICO CITY, MEXICO

Rubén Sánchez
Israel Camarillo

SENIOR ANALYSTS

José Ángel Agejas
Madrid, Spain
Rafael García-Pavón
Mexico City, Mexico
Michael Augros
Los Angeles, USA

SENIOR RESEARCHER

Christopher Oleson
Los Angeles, USA

ASSOCIATES

Armando del Bosque
Atlanta, USA
Roberto Saraiva
Sao Paulo, Brazil
Mono Chan
Hong Kong, China
Christian Propp
Stuttgart, Germany
Laurent Thonnon
Brussels, Belgium
Rodolfo Caballero
Houston, USA

COUNTRY MANAGERS

Andrés Hernández
Spain

GLOBAL EXECUTIVE DIRECTOR

Vicente Arancón

PRESIDENT

Michael Ryan

CONTACT US

Vicente Arancón
Global Executive Director
(52) 55 3685 2600 ext. 1013
vicente.arancon@fidelisinstitute.org

SCREENING SERVICES



www.fidelisinstitute.org

Follow us:
Facebook: Fidelis International Institute
Twitter: @FidelisInstitut



We believe all investments have an ethical implication, we help investors make sure their money is invested responsibly.

By using an ethical screen, investors can select from a wide range of companies, in all industries and geographies, that have passed a strict ethical filter.

Fidelis has identified a group of companies that can be considered 'ethical investments' as they have passed our rigorous methodology. This group of companies is updated periodically to guarantee information is fresh and relevant at all times. All companies get screened twice per year.

Our Ethical Principles:

1. Natural Law
2. Common Good
3. Family
4. Human Dignity

Our Ethical Evaluation Criteria:

1. Violence to human life and instrumentalization of procreation.
2. Workers' rights violations.
3. Questionable dealings in arms development, production and sales.
4. Involvement in the pornography industry.
5. Incitement to the immoderate use of alcohol or tobacco, or to excessive gambling.
6. Abuse of natural resources.
7. Fraud, money laundering, corruption and similar illegal activities.
8. Promotion of unchristian ideals.
9. Complicity with government injustice.

Some important ideas about ethical investments:

YOU FEEL COMFORTABLE ABOUT YOUR INVESTMENTS: Through our Screening Services you can be sure that your money is not being used to finance evil, pollute the world, violate human rights, or collaborate with totalitarian regimes in some remote country.

RESPONSIBLE INVESTMENT AND RESULTS ARE COMPATIBLE: With our Screening, financial results do not need to be penalized. Asset managers have so many investing possibilities that beating the market is absolutely compatible with respecting your ethical principles.

COMPATIBILITY AND EASE OF USE: *Fidelis Screening Services can be used by asset managers or private bankers easily.*

How do we help our clients?

INDIVIDUAL AND INSTITUTIONAL INVESTORS: Through our Screening Services, Fidelis grants investors of all sizes and risk-profiles, the possibility of having their assets invested in ethically compliant securities (stocks, bonds, etc).

ASSET MANAGERS, PRIVATE BANKS, FINANCIAL INSTITUTIONS: Fidelis Screening Services allow them to make investment recommendations to their clients, feeling comfortable that the assets they manage are always invested in instruments that congruently coexist with their clients' ethical principles.

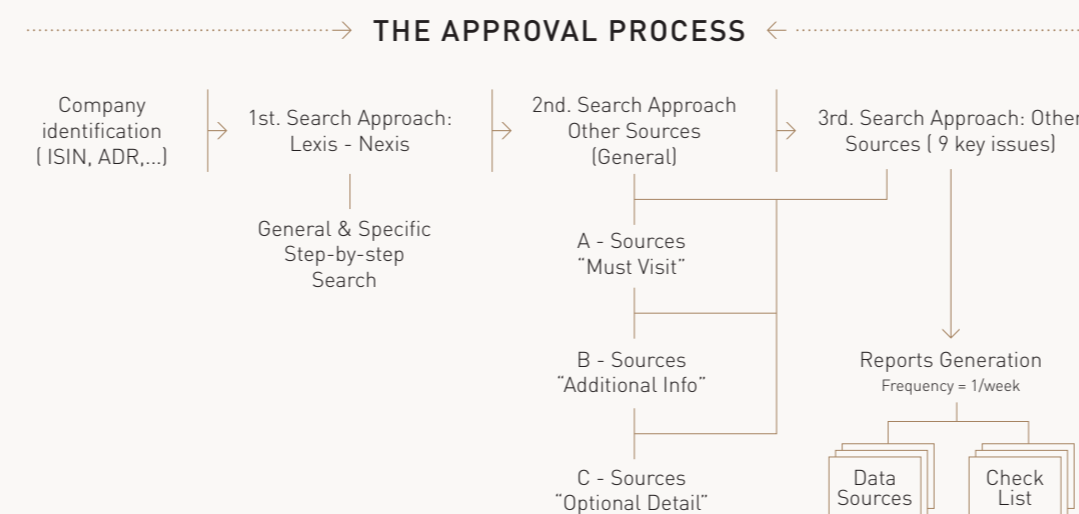
ORGANIZATIONS, TRUSTS, FOUNDATIONS AND ENDOWMENTS: Fidelis offers guidelines and recommendations to ensure ethically compliant investment decisions. Treasuries of these organizations can rely on our advice when it comes to deciding where to invest their assets.

How do we work with asset managers and private bankers?

INVESTMENT RECOMMENDATIONS: By working with our Ethical Screening, asset managers and private bankers can select from a wide range of securities, in all industries and geographies, that have passed a strict ethical filter. What our clients use is basically a list of securities that can be comfortably considered 'ethical investments' as they have passed our rigorous methodology. These lists are updated periodically and systematically to guarantee information is fresh and relevant at all times.

DIFFERENTIATOR = MORE SERVICE: Fidelis Screening Services allow private bankers and asset managers to offer their clients a distinctive service that is unique in the financial services industry. Asset managers can tailor-made their services to match their customers' needs and aspirations. Using Fidelis Screening Services, asset managers of all types can offer their clients a real differentiator that makes them stand out among the competition.

Our screening methodology



OUR SCREENING SERVICES COVER ALL THE MAJOR STOCK EXCHANGE INDEXES:

INDEX	COVERAGE IN %
Dow Jones Industrials	100
Eurostoxx 50	100
Eurostoxx 600	50
S&P 500	75
Nasdaq	100
London FTSE 100	100
Milan-FTSE	100
Frankfurt DAX	100
Paris CAC40	100
Madrid BIM	100
Swiss SMI	100
Tokio Nikkei 225	16
MSCI Emerging Markets	100

“More than 1,300 public companies are constantly being screened by Fidelis.”

Some of the most important investment Banks in the World, located in the UK, USA and Switzerland are already using Fidelis' screening services to conform ethical indexes and investment funds.

In addition, Fidelis has been actively involved in the development of investment portfolios with one of the most prominent American financial institutions based in New York, NY.

Why Fidelis?

We have a strong research and consulting structure that guarantees the quality and objectivity of our results. Among our strengths we can mention:

- We have partnered with several ethical researchers based in Europe (Italy & Spain), the US (NY) and Latin America (Mexico).
- Our multinational and multidisciplinary research team is comprised of people from more than 6 nationalities.
- Our advisory board is integrated by eight business leaders and entrepreneurs with backgrounds in banking, finance and law and hold degrees in theology, philosophy, marketing, and, of course ethics.
- Our research partners have a proven competence. The more than 72 undergraduate and 45 postgraduate programs that our partners currently offer demonstrate their excellence.

