

FUND	NAME OF ISSUER	TICKER	CUSIP	CONTROL NO.	MEETING TYPE	RECORD DATE	MEETING DATE	MATTERS TO BE VOTED ON	MATTERS PROPOSED BY	VOTES SUBMITTED	COMMENTS ON VOTES AGAINST BOARD RECOMMENDATION
LEAD	PALO ALTO NETWORKS, INC.	PANW	697435105	2656 2311 3377 3180	Annual Meeting	10/18/2024	12/10/2024	Election of Class I Directors, Ratification of Auditor, Advisory Vote on Executive Compensation, Amendment to the Palo Alto Networks, Inc. 2021 Equity Incentive Plan, Shareholder Proposal regarding a report on climate risks to retirement plan beneficiaries	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. MGMT, 6. Shareholder	1a. Against, 1b. For, 1c. For, 2. For, 3. 1 Year, 4. Against, 5. For, 6. Against	1a. Insufficient response to shareholder dissent, 4. Insufficient response to shareholder dissent
LEAD	Zscaler Inc.	ZS	98980G102	4357 8736 6070 9606	Annual Meeting	11/13/2024	01/09/2024	Election of Directors, Ratification of Auditor, Advisory Vote on Executive Compensation, Amendment to the 2018 Equity Incentive Plan	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT	1.01 For; 1.02 Withhold; 1.03. Withhold; 2. For; 3. Against; 4. Against	1.02 Ongoing compensation concerns; Serves on too many boards; Insufficient board gender diversity; No independent lead or presiding director; 1.03. Ongoing compensation concerns; 3. Poor overall design; Insufficient response to shareholder dissent; 4. Plan allows for repricing. Contains Evergreen Provisions
LEAD	Visa Inc., Class 'A'	V	92826C839	2732 5735 5698 5793	Annual Meeting	12/02/2024	01/28/2025	Election of Directors, Ratification of Auditor, Advisory Vote on Executive Compensation, Shareholder Proposal Regarding Report on Benefits and Health Program Gaps, Shareholder Proposal Regarding Report on Oversight of Merchant Category Codes, Shareholder Proposal Regarding Mandatory Director Resignation Policy, Shareholder Proposal Regarding Lobbying Report	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder, 5. Shareholder, 6. Shareholder, 7. Shareholder	1. For, 2. For, 3. For, 4. Against, 5. Against, 6. For, 7. Against	6. Adoption could promote board accountability and ensure responsiveness to shareholder concerns
LEAD	Walt Disney Company (The)	DIS	254687106	3189 9124 8812 3258	Annual Meeting	01/20/2025	03/20/2025	Election of Directors, Ratification of Auditor, Advisory Vote on Executive Compensation, Shareholder Proposal Regarding Report on Climate Risks to Retirement Plan Beneficiaries, Shareholder Proposal Regarding Participation in Human Rights Campaign's Corporate Equality Index, Shareholder Proposal Regarding Report on Risks Related to Selection of Ad Buyers and Sellers.	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder, 5. Shareholder, 6. Shareholder	1. For, 2. For, 3. For, 4. Against, 5. Against, 6. Against	4. Plan proposed isn't a prudent use of resources, 5. shareholders shouldn't be involved in day-day/long-term management decisions of the company, 6. advertising / day-day management decisions shouldn't be made by shareholders.
LEAD	Novartis AG	NVS	66987V109	6850 1724 1861 3983	Annual Meeting	01/27/2025	03/07/2025	Approval of Financial Statements, Discharge From Liability of BoD & Exec Committee, Appropriation of available earnings, Reduction of Share Capital, Further Share Repurchases, Electronic participation at General meeting w/out venue, Maximum aggregate comp. for BoD, Election of Directors, Election of Compensation Committee, Election of Auditor, Election of Independent Proxy, Transaction of Other Business	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. MGMT, 6. MGMT, 7. MGMT, 8. MGMT, 9. MGMT, 10. MGMT, 11. MGMT, 12. MGMT	1. For, 2. For, 3. For, 4. For, 5. For, 6. For, 7. For, 8. For, 9. For, 10. For, 11. For, 12. Against	12. Transaction of Other Business; Granting unfettered discretion is unwise.
LEAD	Goldman Sachs Group, Inc.	GS	38141G104	0926 7214 3098 8284	Annual Meeting	02/24/2025	04/24/2025	Election of Directors, Executive Compensation, Amended Stock Incentive Plan, Ratifying PWC as Independent Public accounting firm, DEI Goals in exec pay incentives, Racial Discrimination Audit, Energy Supply Financing Ratio	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. Shareholder, 6. Shareholder, 7. Shareholder.	1. For, 2. Against, 3. For, 4. For, 5. Against, 6. Against, 7. Against	2. Concerning Pay Practices
LEAD	Eli Lilly and Company	LLY	532457BY3	7777 3136 3112 9340	Annual Meeting	02/26/2025	05/05/2025	Election of Directors, Executive Compensation, Appointment of Auditor, Amend Article of Incorporation - classified board structure, Amend AOI - Supermajority Voting Provisions	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. MGMT	1. a-c For, 1.d Against, 2. For, 3. For, 4. For, 5. For	1d. Board level diversity demographic information not fully disclosed.
LEAD	American Express Co.	AXP	025816109	3961 4464 4555 5911	Annual Meeting	03/03/2025	04/29/2025	Election of Directors, Appointment of Auditor, Executive Compensation, DEI Goals & Incentives, Civil Liberties in Advertising Services	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder, 5. Shareholder	1. a,c,e-i, For, 1. b,d, Against, 2. For, 3. For, 4. Against, 5. Against.	1.b. Serves on too many boards, 1.d, Affiliate/Insider on Compensation and Nominating/Governance Committees.
LEAD	Intuitive Surgical, INC.	ISRG	46120E002	5752 7852 7118 2433	Annual Meeting	03/03/2025	05/01/2025	Election of Directors, Executive Compensation, Appointment of Auditor, Amend and Restate 2010 Incentive awards plan, Stockholder proposal - exec comp., Excessive global parachutes	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. Shareholder, 6. Shareholder	1. For, 2. For, 3. For, 4. Against, 5. Against, 6. For.	4. Cost of plan is excessive, 6. Shareholder should be consulted before company enters into severance agreements that provide benefits exceeding 2.99 times salary and bonus.
LEAD	Constellation Software Inc.	CSU	815C4L6	6838 1595 7271 6012	Annual Meeting	04/03/2025	05/13/2025	Election of Directors, Appointment of Auditor, Executive Compensation	1. MGMT, 2. MGMT, 3. MGMT	1.01,02,05. Withhold, 1.03,03,06,07,08,09. For, 2. For, 3. For	1.01 CFO On Board, 1.02 Affiliate/Insider on audit committee, 1.05 insufficient board level oversight of environmental and social issues
LEAD	Morgan Stanley	MS	617446448	5569 5392 1392 9519	Annual Meeting	03/17/2025	05/15/2023	Election of Directors, Appointment of Auditor, Executive Compensation, Restate Equity Incentive Comp. Plan, Shareholder Proposal requesting an Energy Supply Ratio	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. Shareholder	1a-m For, 1n Against, 2. For, 3. For, 4. For, 5. Against	1n. Board level diversity demographic information not fully disclosed
LEAD	Vertex Pharmaceuticals Inc.	VRTX	92532F100	4786 3064 6179 6210	Annual Meeting	03/17/2025	05/14/2025	Election of Directors, Appointment of Auditor, Executive Compensation, Excessive Golden Parachute	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder	1. For, 2. For, 3. For, 4. For	4. Shareholders should be consulted before the company enters into severance agreements that provide benefits exceeding 2.99 times salary and bonus
LEAD	Advanced Micro Devices	AMD	7903107	7010 3517 2592 9457	Annual Meeting	03/19/2025	05/13/2025	Election of Directors, Appointment of Auditor, Executive Compensation	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. Shareholder	1. For, 2. For, 3. Against, 4. For, 5. Against, 6. For	3. Pay for performance disconnect, 5. Not in
LEAD	JP Morgan Chase	JPM	46625H100	3479 3389 7491 2885	Annual Meeting	03/21/2025	05/20/2025	Election of Directors, Executive Compensation, Ratification of Accounting Firm, Independent Board Chairman, Report Social Impacts of Transition Finance	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder, 5. Shareholder	1. For, 2. For, 3. For, 4. For, 5. Against	4. An independent chair is better able to oversee the executives of a company and set a pro-shareholder agenda
LEAD	META Platforms Inc.	META	30303M10	8348 0055 7033 9612 2	Annual Meeting	04/01/2025	05/28/2025	Election of Directors, Appointment of Auditors, Equity Incentive Plan, Executive Compensation, Dual Class Capital Structure, Voting based on Share Class, Report on Hate targeting Marginalized Communities, Report on Child Safety Impacts, AI Data usage oversight, GHG emissions reduction actions, Bitcoin Treasury Assessment, Data Collection and Advertising Practices	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. MGMT, 6. Shareholder, 7. Shareholder, 8. Shareholder, 9. Shareholder, 10. Shareholder, 11. Shareholder, 12. Shareholder, 13. Shareholder, 14. Shareholder,	1.01, 02,06,11,12,14. Withhold, 1.03,04,05,07,08,09,10,13,15. For, 2. For, 3. Against, 4. For, 5. 1a-y, 6. for, 7. for, 8. for, 9. for, 10. for, 11. for, 12. against, 13. against, 14. for	1.01. Board level diversity not fully disclosed, 1.02 did not implement SHP passed by shareholders, 1.06 did not implement SHP passed by shareholders, 1.11 insider on audit committee, 1.12 other governance issue, 1.14 did not implement SHP passed by shareholders, 1. contains evergreen protection, 6. Allowing one vote per share generally operates as a safeguard for common shareholders, 7. adoption may provide shareholders more clarity concerning how different classes of shareholders haven't cast their votes, 8. additional disclosure on co's efforts to address hate speech on platform is warranted, 9. provides assurance co is managing associated risks, 10. allow shareholders to better gauge co's exposure to regulatory and reputational risks, 11. allow shareholders to understand the company's management of ai-related risks, 14. could provide shareholders with a better basis to understand risks.
LEAD	NETFLIX INC.	NFLX	64110L106	7208 4948 8813 1774	Annual Meeting	04/07/2025	06/04/2025	Election of Directors, Appointment of Independent accounting firm, Executive Compensation, Issuance of a "Climate Transition Plan", Proposal to win 45% of NFLX Shareholder Support, Amend Code of Ethics to enhance policies on non-discrimination, anti-harassment and whistle blower protections., Affirmative action risks, Report on Charitable Giving	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder, 5. Shareholder, 6. Shareholder, 7. Shareholder, 8. Shareholder	1a-c-e-1. For, 1.d. against, 2. For, 3. For, 4. Against, 5. For, 6. Against, 7. Against, 8. Against	1d. Less than 75% attendance, 5. 15% threshold for calling a special meeting is appropriate
LEAD	Amazon.com Inc.	AMZN	23135106	8818 7244 7260 6142	Annual Meeting	03/27/2025	05/21/2025	Election of Directors, Appointment of Auditor, Executive Compensation	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder	1. For, 2. For, 3. For, 4. For, 5. Against, 6. Against, 7. Against, 8. 1(a,c-h,j) For, 1(b-j) Against, 2. For, 3. Form, 4. For	4. A non-executive chair is better to oversee the 1b, Affiliate/Insider on Compensation Committee & nominating/governance committee, 1i. Board level diversity demographic information not fully disclosed, 4. Shareholder should be consulted before the company enters into severance agreements that provide benefits exceeding 2.99 times salary and bonus.
LEAD	Unitedhealth group Inc.	UNH	91324P102	2979 4991 3199 0754	Annual Meeting	04/04/2025	06/01/2025	Election of Directors, Executive Compensation, Appointment of Accounting Firm, Excessive Golden Parachute	1. MGMT, 2. MGMT, 3. MGMT, 4. Shareholder	1. For, 2. For, 3. For, 4. For, 5. Against, 6. Against, 7. Against, 8. 1(a,c-h,j) For, 1(b-j) Against, 2. For, 3. Form, 4. For	4. A non-executive chair is better to oversee the 1b, Affiliate/Insider on Compensation Committee & nominating/governance committee, 1i. Board level diversity demographic information not fully disclosed, 4. Shareholder should be consulted before the company enters into severance agreements that provide benefits exceeding 2.99 times salary and bonus.
LEAD	Shopify	SHOP	82509L107	5653 5873 8246 4232	Annual Meeting	04/21/2025	06/17/2025	Election of Directors, Auditor Proposal, Executive Compensation	1. MGMT, 2. MGMT, 3. MGMT	1.A,B,D,F-I. For 1.C,E,J. Against, 2. For, 3. Against	1.C. Ongoing compensation concerns; insufficient response to shareholder dissent, 1.E. Multi-class share structure with unequal voting rights, 1.I. Ongoing compensation concerns; Insufficient response to shareholder dissent, 3. Grants are excessive; pay for performance disconnect.
LEAD	NASDAQ Inc.	NDAQ	631103108	2629 0791 2991 7840	Annual Meeting	04/14/2025	06/10/2025	Election of Directors, Executive Compensation, Auditor Proposal, Ammendment to Certificate of Incorporation	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT	1. For, 2. For, 3. For, 4. Against	4. Amendment is not in best interest of the shareholders

LEAD	Reddit Inc.	RDOT	757348100	7201 2229 2314 4192	Annual Meeting	04/14/2025	06/08/2025	Election of Directors, Accountant Proposal, Executive compensation, freq. of future votes on exec. compensation	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT	1.01,03-08. Withhold, 1.02 For, 2. For, 3. For, 4. 1 Year	1.01,1.03-08. Individuals were board members prior to IPO, Post-IPO charter places substantial restriction on rights of shareholders, restrictiveness of governing documents at ipo warrant opposing election of directors serving at time of IPO.
LEAD	Microstrategy Incorporated	MSTR	594972408	7705 7885 8137 9995	Annual Meeting	04/22/2025	06/11/2025	Election of Directors, Accounting firm proposal	1. MGMT, 2. MGMT	1.01-06, 08. For, 1.07. Withhold, 2. For	1.07. Multi-Class Share Structure with unequal voting rights
LEAD	Alphabet Inc.	GOOG	02079K305	3659 4960 0558 5425	Annual Meeting	04/08/2025	06/05/2025	Election of Directors, Auditor Proposal, Shareholder right to act by written consent, Financial performance policy, report on charitable partnerships, request to cease CEI participation, enhanced disclosure on climate goals, equal shareholder voting, due dill report assess Human Rights risks in CAHRA, report on risks of discrimination in GenAI, report on AI Data usage oversight, Human Rights impact assessment of AI Driven targeted ad policies, child safety policies, report on online safety of children	1. MGMT, 2. MGMT, 3. Shareholder, 4. Shareholder, 5. Shareholder, 6. Shareholder, 7. Shareholder, 8. Shareholder, 9. Shareholder, 10. Shareholder, 11. Shareholder, 12. Shareholder, 13. Shareholder, 14. Shareholder	1.a.d.g. Against 1.b.c.e.f,h-j. For, 2. For, 3. For, 4. Against, 5. Against, 6. Against, 7. Against, 8. For, 9. Against, 10. Against, 11. For, 12. For, 13. Against, 14. Against	1a, less than 75% attendance, 1d. Board level diversity demographic not fully disclosed, 1g. Insider on Compensation Committee, 3. Shareholder action by written consent enables shareholders to take action on important issues that arise between annual meetings, 8. Allowing 1 vote per share generally operates as a safeguard for common shareholders, 11. Additional disclosure will better allow shareholders to understand the company's management of AI related risks, 12. An independent review of human rights considerations in advertising could benefit shareholders.
LEAD	Salesforce Inc.	CRM	794661302	1672 0913 5227 2984	Annual Meeting	04/11/2025	06/04/2025	Election of Directors, Amend Equity Incentive Plan, Auditor Proposal, Executive Compensation	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT	1a-h,j,l. For, 1i,k. Against, 2. For, 3. For, 4. Against	1i. Insider on Audit Committee, 1k. CFO on Board, 4. Pay for Performance Disconnect
LEAD	Coinbase Global Inc.	COIN	19260Q107	9958 8154 9774 2457	Annual Meeting	04/21/2025	06/17/2025	Election of Directors, Auditor Proposal, Executive Compensation	1. MGMT, 2. MGMT, 3. MGMT	1.01,03,04,06-08,10. For, 1.02,05,09. Withhold, 2. For, 3. For	1.02. less than 75% attendance, 1.09. Board level diversity demographic information not fully disclosed; insufficient gender diversity; insufficient disclosure of board diversity and policies; multi class share structure with unequal voting rights.
LEAD	Mastercard Inc.	MA	57636Q104	5163 8474 6914 1316	Annual Meeting	04/25/2025	04/24/2025	Election of Directors, Executive Compensation, Auditor Proposal, amend certificate of incorporation (limit liability of officers), amend certificate of incorporation (remove the industry director concept), amend the certificate of incorporation (other misc. changes), racial equity audit report, report on affirmative action risk	1. MGMT, 2. MGMT, 3. MGMT, 4. MGMT, 5. MGMT, 6. MGMT, 7. Shareholder, 8. Shareholder	1. For, 2. For, 3. For, 4. Against, 5. For, 6. For, 7. Against, 8. Against	4. Not in Shareholders best interest.
LEAD	Sony Group Corp.	SNE	835699307	6359 0889 9677 6914	Annual Meeting	03/31/2025	06/24/2025	Reduce Capital reserves, Election of	1. MGMT, 2. MGMT, 3. MGMT	1. For, 2. For, 3. For	N/A