



## Press Release

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### **Altum Faithful Investing Awards Gold Certification to Wallick Investments' WI Fidelis Multi-Cap Multi-Factor Index (Fidelis 100)**

Altum Faithful Investing and Wallick Investments announce that the Wallick Investments' **Fidelis 100 Index** has been awarded **Gold certification** under the **Altum Certified** program, confirming that the index is fully aligned with the principles of the Social Doctrine of the Catholic Church while maintaining a rigorous, rules-based quantitative investment approach.

The certification recognizes the Fidelis 100 Index as a faith-consistent investment solution designed for investors seeking market exposure without compromising their deeply held values. It also reflects a growing demand among institutions, families, and faith-driven investors for strategies that combine financial discipline with ethical coherence.

#### **A quantitative index aligned with faith-based principles**

The Altum Certified program conducts a comprehensive assessment to determine whether a financial product conflicts with the principles of the Social Teaching of the Church. The evaluation is based on Altum's proprietary Investment Guidelines, which rest on four core pillars:

- Promotion of Human Dignity
- Promotion of Human Life
- Promotion of the Family
- Care for and Protection of Creation

The **Gold certification** confirms that the index presents no material conflicts with these Catholic principles, enabling faith-driven investors to pursue market exposure with confidence and consistency.

**Fidelis 100** is an equity index built using a multi-cap, multi-factor approach, designed to systematically capture return drivers across market cycles while maintaining a disciplined and transparent portfolio construction process. The underlying methodology also integrates **Inspire Investing's** proprietary Inspire Impact Score, a Biblically Responsible screening framework incorporating screening for life and health; morality

and lifestyle; social and political criteria; and governance and ethical criteria. Positive social impact scores are given to companies with no negative violations and are based on 26 environmental, social and governance categories viewed through a generally accepted biblical world view lens, in line with Christian orthodoxy. Fidelis 100's positive Inspire Impact Score validates adherence to Inspire's Biblically Responsible investment standards.

**Fidelis 100** contains 100 equally-weighted companies which have significant exposure to evidence-based equity factors and minimal exposure to companies with poor factor-based scores, all while maintaining adherence to Altum Faithful Investing Catholic principles and Inspire's Biblically Responsible Standards.

The Fidelis 100 Index is replicated by Inspire Investing for their Inspire Fidelis Multi-Factor ETF (NYSE: FDLS), whose mandate is to replicate the investment results that generally correspond, before fees and expenses, to the performance of the Fidelis 100 Index.

### **Meeting the growing demand for faith-consistent investing**

"We are proud to see firms like Wallick Investments that are not afraid of swimming against the current. The fact that Wallick Investments has entrusted Altum to certify its index is a clear sign that Faith-Consistent Investing is gaining global relevance," said Borja Barragán, CEO of Altum Faithful Investing. "It also demonstrates that quantitative excellence, disciplined portfolio construction, and ethical coherence are not mutually exclusive—but fully compatible."

"Inspire Social Impact scoring and the Altum Gold certification are the crucial first steps in our equity selection process, providing rich "soil" for our Fidelis 100 factor-based methodology to meet the growing demand for alignment between personal values and investment decisions."  
– Daniel Wallick, managing partner of Wallick Investments

### **About Altum Faithful Investing**

Founded in 2017, Altum Faithful Investing is a CNMV-regulated investment firm with faith-sensitive clients across the globe, specializing in advisory, portfolio management, and ethical analysis grounded in the Social Teaching of the Catholic Church. Altum's mission is to demonstrate that investors can pursue competitive returns while remaining fully consistent with their faith.

More information: <https://altumfi.com>

### **About Wallick Investments**

June 2025 marked the 20th anniversary for Wallick Investments, an SEC-registered investment advisory firm focused on faith- and factor-based investment methodology. Championing

investment science with faith-consistent security selection is Wallick Investments' mission, and the firm is grateful for Altum Faithful Investing and Inspire Investing and their commitment to "faith and reason" in this shared mission.

More information: <https://www.Fidelis100.com>

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