

# PREVENTION RESEARCH INSTITUTE INC

## Screens Summary (Data as of 12-31-2025)

🚫 Fund Removed from Approved List    ⚠️ Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management			Style		Expense		ESG Metrics				
			1 Yr	3 Yr	5 Yr	10 Yr	Pass/ Fail	Std Dev 3 Yr %	Beta 3 Yr %	Tenure	Pass/ Fail	Style Box	Pass/ Fail	Exp Ratio	Pass/ Fail	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated
<b>US Stock</b>																		
American Funds Invmt Co of Amer R6 percentile rank	RICGX	Large Blend	20.86	24.98	15.72	14.43	✔️	11.57	0.94	33.94	✔️	🏠	✔️	0.27	✔️	2	-	Low Risk
# of funds in category			1,379	1,265	1,169	906									12-31-2025	-	12-31-2022	
Vanguard 500 Index Admiral percentile rank	VFIAX	Large Blend Index	17.83	22.96	14.38	14.78	✔️	11.95	1.00	8.18	✔️	🏠	✔️	0.04	✔️	3	1-Low	Low Risk
# of funds in category			1,379	1,265	1,169	906									12-31-2025	02-15-2022	12-31-2022	
Vanguard Mid Cap Index Admiral percentile rank	VIMAX	Mid-Cap Blend	11.67	14.27	8.60	10.91	✔️	14.78	0.95	2.50	❌	🏠	✔️	0.05	✔️	4	1-Low	Medium Risk
# of funds in category			455	398	362	274									12-31-2025	02-15-2022	12-31-2022	
Vanguard Small Cap Index Admiral Shares percentile rank	VSMAX	Small Blend	8.83	13.69	7.34	10.43	✔️	17.94	0.88	9.77	✔️	🏠	✔️	0.05	✔️	4	1-Low	Medium Risk
# of funds in category			645	608	587	454									12-31-2025	02-15-2022	12-31-2022	
<b>Non-US Stock</b>																		
American Funds Intl Gr and Inc R6 percentile rank	RIGGX	Foreign Large Blend	35.53	17.60	8.73	8.86	✔️	11.24	0.93	17.35	✔️	🏠	✔️	0.53	✔️	2	1-Low	Low Risk
# of funds in category			756	708	661	506									12-31-2025	02-15-2022	12-31-2022	
<b>Fixed Income</b>																		
Vanguard Inflation-Protected Secs Adm percentile rank	VAIPX	Inflation- Protected Bond	6.87	4.15	1.03	2.98	✔️	4.65	1.01	4.23	✔️	-	-	0.10	✔️	3	-	-
# of funds in category			158	149	142	118									12-31-2025	-	-	
Baird Aggregate Bond Inst percentile rank	BAGIX	Intermediate- Term Bond	7.36	5.19	-0.13	2.43	✔️	6.13	1.01	25.36	✔️	🏠	-	0.30	✔️	4	1-Low	-
# of funds in category			512	471	422	299									12-31-2025	02-15-2022	-	
Lincoln Stable Value Account -LNGPA percentile rank		Stable Value	-	-	-	-	-	-	-	42.78	✔️	-	-	-	-	-	-	-
# of funds in category			37	-	-	-									-	-	-	
Federated Hermes Govt Ultrashort R6 percentile rank	FGULX	Ultrashort Bond	5.11	5.30	3.25	-	✔️	0.58	0.08	28.58	✔️	-	-	0.24	✔️	-	-	-
# of funds in category			247	209	182	111									-	-	-	
<b>Balanced</b>																		
American Funds American Balanced R6 percentile rank	RLBGX	Moderate Allocation	18.85	16.16	9.92	10.14	✔️	8.46	0.98	27.10	✔️	-	✔️	0.25	✔️	3	1-Low	Low Risk
# of funds in category			492	470	452	373									12-31-2025	02-15-2022	12-31-2022	

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## Style Analysis (Data as of 12-31-2025)

### Style Analysis

Morningstar Style Box US Stock



Morningstar Style Box Non-US Stock



**US Stock Funds**

Fund	Category	Super Sectors %			Asset Allocation %			Avg Mkt Cap M\$
		Cyclical	Defensive	Sensitive	Cash	US Stock	Foreign	
1 American Funds Invmt Co of Amer R6	Large Blend	22.56	20.14	57.29	2.67	87.54	9.18	440.71
2 Vanguard 500 Index Admiral	Large Blend Index	27.06	16.58	56.36	0.22	99.07	0.53	461.00
3 Vanguard Mid Cap Index Admiral	Mid-Cap Blend	34.97	22.47	42.56	0.37	97.72	1.58	41.45
4 Vanguard Small Cap Index Admiral Shares	Small Blend	37.14	19.09	43.79	1.13	96.90	1.96	9.00

**Non-US Stock Funds**

Fund	Category	Super Sectors %			Regional Exposure %			Market Maturity %		
		Cyclical	Defensive	Sensitive	Americas	Greater Asia	Greater Europe	Developed	EM	Avg Mkt Cap M\$
1 American Funds Intl Gr and Inc R6	Foreign Large Blend	40.74	18.81	40.44	11.18	30.42	58.41	87.65	12.35	70.46

**Fixed Income Funds**

Fund	Category	Super Sectors %				Other Stats		Credit Quality %		
		US Govt Debt	Mtg Credit	US	Non US	Avg Eff Duration	Inv Grade	Below Grade	NR/NA	
1 Vanguard Inflation-Protected Secs Adm	Inflation-Protected Bond	99.88	0.00	0.00	0.00	6.55	99.77	0.00	0.23	
2 Baird Aggregate Bond Inst	Intermediate-Term Bond	29.47	19.85	42.33	0.00	5.98	99.70	0.30	0.00	
3 Lincoln Stable Value Account -LNGPA	Stable Value	-	-	-	0.00	-	0.00	0.00	-	
4 Federated Hermes Govt Ultrashort R6	Ultrashort Bond	9.35	65.89	0.00	0.00	0.81	100.00	0.00	0.00	