

PREVENTION RESEARCH INSTITUTE INC

Screens Summary (Data as of 06-30-2025)

⊖ 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	Commit. Level	Carbon Risk	
																	Updated	Updated	Updated
US Stock																			
American Funds Invmt Co of Amer R6 percentile rank # of funds in category	RICGX	Large Blend	21.19 4 1,431	23.46 3 1,323	17.75 7 1,210	13.21 23 916	✔	14.61	0.90	33.35	✔	🇺🇸	✔	0.27	✔	2	—	Low Risk	
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	15.12 28 1,431	19.66 23 1,323	16.60 21 1,210	13.60 9 916	✔	15.80	1.00	7.59	✔	🇺🇸	✔	0.04	✔	3	1-Low	Low Risk	
Vanguard Mid Cap Index Admiral percentile rank # of funds in category	VIMAX	Mid-Cap Blend	17.50 9 449	14.32 27 408	13.01 51 379	9.96 20 261	✔	18.15	0.97	1.91	✖	🇺🇸	✔	0.05	✔	4	1-Low	Medium Risk	
Vanguard Small Cap Index Admiral Shares percentile rank # of funds in category	VSMAX	Small Blend	10.14 14 630	12.16 19 595	11.84 49 574	8.57 18 415	✔	20.95	0.92	9.18	✔	🇺🇸	✔	0.05	✔	4	1-Low	Medium Risk	
Non-US Stock																			
American Funds Intl Gr and Inc R6 percentile rank # of funds in category	RIGGX	Foreign Large Blend	18.79 39 764	15.13 48 713	11.36 31 669	6.53 40 469	✔	15.10	0.98	16.76	✔	🇺🇸	✔	0.54	✔	3	1-Low	Low Risk	
Fixed Income																			
Vanguard Inflation-Protected Secs Adm percentile rank # of funds in category	VAIPX	Inflation-Protected Bond	5.68 57 161	2.16 62 152	1.52 49 141	2.58 36 117	✔	6.88	1.00	3.64	✔	—	—	0.10	✔	3	—	—	
Baird Aggregate Bond Inst percentile rank # of funds in category	BAGIX	Intermediate-Term Bond	6.21 33 523	3.18 20 480	-0.33 30 423	2.15 17 301	✔	7.36	1.01	24.77	✔	🇺🇸	—	0.30	✔	4	1-Low	—	
Lincoln Stable Value Account -LNGPA percentile rank # of funds in category		Stable Value	— — 13	— — —	— — —	— — —	—	—	—	42.19	✔	—	—	—	—	—	—	—	
Federated Hermes Govt Ultrashort R6 percentile rank # of funds in category	FGULX	Ultrashort Bond	5.20 61 257	4.69 75 212	2.77 69 188	— — 114	✔	0.74	0.07	27.99	✔	—	—	0.24	✔	—	—	—	
Balanced																			
American Funds American Balanced R6 percentile rank # of funds in category	RLBGX	Moderate Allocation	14.62 4 458	13.27 15 439	10.41 17 412	9.27 10 337	✔	11.01	0.98	26.51	✔	—	✔	0.25	✔	2	1-Low	Low Risk	