

PREVENTION RESEARCH INSTITUTE INC

Screens Summary (Data as of 06-30-2026)

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 R-6 percentile rank	RICGX	Large Blend	19.70	22.76	14.81	14.71	🟢	13.12	0.98	34.35	🟢	🇺🇸	🟢	0.27	🟢	2	-	Low Risk
# of funds in category			59	8	8	45												
			1,444	1,334	1,245	988										06-30-2026	-	12-31-2022
Vanguard 500 Index Admiral percentile rank	VFIAX	Large Blend Index	22.27	20.56	13.36	15.46	🟢	13.05	1.00	8.59	🟢	🇺🇸	🟢	0.04	🟢	3	1-Low	Low Risk
# of funds in category			35	27	21	18												
			1,444	1,334	1,245	988										06-30-2026	02-15-2022	12-31-2022
Vanguard Morn Mid Cap Index Admiral percentile rank	VIMAX	Mid-Cap Blend	16.75	15.32	7.94	11.77	🟢	14.34	0.95	2.91	🔴	🇺🇸	🟢	0.05	🟢	4	1-Low	Medium Risk
# of funds in category			75	52	68	38												
			485	433	409	314										06-30-2026	02-15-2022	12-31-2022
Vanguard Morn Small Cap Index Admiral percentile rank	VSMAX	Small Blend	29.48	16.72	7.68	11.74	🟢	17.26	0.85	3.34	🟢	🇺🇸	🟢	0.05	🟢	4	1-Low	Medium Risk
# of funds in category			72	48	55	36												
			709	673	648	524										06-30-2026	02-15-2022	12-31-2022
Non-US Stock																		
American Funds Intl Gr and Inc R-6 percentile rank	RIGGX	Foreign Large Blend	24.94	18.16	9.09	10.12	🟢	12.33	0.86	17.76	🟢	🇺🇸	🟢	0.53	🟢	2	1-Low	Low Risk
# of funds in category			29	32	37	30												
			820	784	738	583										06-30-2026	02-15-2022	12-31-2022
Fixed Income																		
Vanguard Inflation-Protected Secs Adm percentile rank	VAIPX	Inflation- Protected Bond	3.42	3.94	0.93	2.46	🟢	4.22	1.00	0.21	🔴	—	—	0.10	🟢	3	-	-
# of funds in category			26	39	44	44												
			176	169	162	137										06-30-2026	-	-
Baird Aggregate Bond Inst percentile rank	BAGIX	Intermediate- Term Bond	3.96	4.61	0.32	1.94	🟢	5.65	1.02	25.77	🟢	🇺🇸	—	0.30	🟢	4	1-Low	-
# of funds in category			29	24	23	18												
			545	509	471	351										06-30-2026	02-15-2022	-
Lincoln Stable Value Account -LNGPA percentile rank		Stable Value	-	-	-	-	—	-	-	43.19	🟢	—	—	-	—	-	-	-
# of funds in category			-	-	-	-												
			82	-	-	-										-	-	-
Federated Hermes Govt Ultrashort R6 percentile rank	FGULX	Ultrashort Bond	4.63	5.14	3.63	2.50	🟢	0.63	0.10	28.99	🟢	—	—	0.24	🟢	-	-	-
# of funds in category			14	53	50	70												
			254	231	189	123										-	-	-
Balanced																		
American Funds American Balanced R-6 percentile rank	RLBGX	Moderate Allocation	21.02	17.32	10.06	10.67	🟢	9.32	1.03	27.51	🟢	—	🟢	0.25	🟢	3	1-Low	Low Risk
# of funds in category			7	3	1	7												
			535	512	494	423										06-30-2026	02-15-2022	12-31-2022