

PREVENTION RESEARCH INSTITUTE INC

Screens Summary (Data as of 09-30-2022)

🚫 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 <i>Updated</i>	Commit. Level <i>Updated</i>	Carbon Risk <i>Updated</i>
US Stock																		
American Funds Invmt Co of Amer R6 <i>percentile rank</i> <i># of funds in category</i>	RICGX	Large Blend	-16.96 60 1,376	6.32 67 1,250	6.41 84 1,131	10.19 65 828	✓	18.78	0.92	30.60	✓	📊	✓	0.27	✓	2	-	Low Risk
Vanguard 500 Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VFIAX	Large Blend Index	-15.51 42 1,376	8.12 23 1,250	9.20 20 1,131	11.66 13 828	✓	20.30	1.00	6.43	✓	📊	✓	0.04	✓	3	1-Low	Low Risk
Vanguard Mid Cap Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VIMAX	Mid-Cap Blend	-19.48 81 412	5.47 49 368	6.64 26 336	10.45 15 219	✓	22.73	0.98	24.38	✓	📊	✓	0.05	✓	4	1-Low	Medium Risk
Vanguard Small Cap Index Adm <i>percentile rank</i> <i># of funds in category</i>	VSMAX	Small Blend	-20.74 67 610	4.98 51 581	5.37 16 539	9.57 17 358	✓	24.64	0.96	6.43	✓	📊	✖️	0.05	✓	4	1-Low	Medium Risk
Non-US Stock																		
American Funds Intl Gr and Inc R6 <i>percentile rank</i> <i># of funds in category</i>	RIGGX	Foreign Large Blend	-25.44 47 755	-1.79 49 706	-0.46 31 617	3.31 49 425	✓	20.07	1.07	14.01	✓	📊	✓	0.54	✓	2	1-Low	Low Risk
Fixed Income																		
Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation-Protected Bond	-11.53 47 210	0.69 51 199	1.84 49 190	0.89 38 128	✓	6.68	0.97	0.89	✖️	—	—	0.10	✓	3	-	-
Baird Aggregate Bond Inst <i>percentile rank</i> <i># of funds in category</i>	BAGIX	Intermediate-Term Bond	-15.26 64 448	-3.07 33 404	-0.09 24 366	1.36 10 272	✓	5.71	1.04	22.02	✓	📊	—	0.30	✓	3	1-Low	-
Lincoln Stable Value Account -LNGPA <i>percentile rank</i> <i># of funds in category</i>		Stable Value	- - 40	- - -	- - -	- - -	—	-	-	39.44	✓	—	—	-	-	-	-	-
Federated Hermes Govt Ultrashort R6 <i>percentile rank</i> <i># of funds in category</i>	FGULX	Ultrashort Bond	-0.38 30 237	0.50 46 216	1.08 61 178	- - 99	✓	0.56	0.07	25.24	✓	—	—	0.24	✓	-	-	-
Balanced																		
American Funds American Balanced R6 <i>percentile rank</i> <i># of funds in category</i>	RLBGX	Moderate Allocation	-13.13 27 766	3.72 25 708	5.14 22 658	7.89 6 487	✓	12.60	0.94	23.76	✓	—	✓	0.25	✓	3	1-Low	Low Risk