

# PREVENTION RESEARCH INSTITUTE INC

## Screens Summary (Data as of 09-30-2024)

🚫 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>
<b>US Stock</b>																		
American Funds Invmt Co of Amer R6 <i>percentile rank</i> <i># of funds in category</i>	RICGX	Large Blend	39.33 6 1,497	13.42 6 1,348	16.13 16 1,236	12.19 47 919	✔️	16.40	0.92	32.61	✔️	📊	✔️	0.27	✔️	2	-	Low Risk
Vanguard 500 Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VFIAX	Large Blend Index	36.29 24 1,497	11.87 22 1,348	15.93 20 1,236	13.34 9 919	✔️	17.52	1.00	6.84	✔️	📊	✔️	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	28.79 34 471	5.31 72 433	11.22 54 391	10.21 26 264	✔️	19.35	0.98	1.62	✖️	📊	✔️	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	27.43 25 616	4.36 48 591	10.66 40 569	9.64 22 404	✔️	21.07	0.92	8.43	✔️	📊	✔️	0.05	✔️	4	1-Low	Medium Risk
<b>Non-US Stock</b>																		
American Funds Intl Gr and Inc R6 <i>percentile rank</i> <i># of funds in category</i>	RIGGX	Foreign Large Blend	22.17 76 789	4.30 56 723	7.58 59 675	5.08 67 442	✔️	16.70	0.99	16.01	✔️	📊	✔️	0.54	✔️	3	1-Low	Low Risk
<b>Fixed Income</b>																		
Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation-Protected Bond	9.82 37 161	-0.62 37 153	2.52 43 145	2.45 24 107	✔️	7.13	0.99	2.90	✖️	—	—	0.10	✔️	3	-	-
Baird Aggregate Bond Inst <i>percentile rank</i> <i># of funds in category</i>	BAGIX	Intermediate-Term Bond	12.58 13 525	-1.10 27 464	0.78 27 415	2.25 13 287	✔️	7.74	1.01	24.02	✔️	📊	—	0.30	✔️	4	1-Low	-
Lincoln Stable Value Account -LNGPA <i>percentile rank</i> <i># of funds in category</i>		Stable Value	- - 14	- - -	- - -	- - -	—	-	-	41.44	✔️	—	—	-	—	-	-	-
Federated Hermes Govt Ultrashort R6 <i>percentile rank</i> <i># of funds in category</i>	FGULX	Ultrashort Bond	6.57 44 252	3.36 54 204	2.38 65 185	- - 114	✔️	0.96	0.07	27.24	✔️	—	—	0.24	✔️	-	-	-
<b>Balanced</b>																		
American Funds American Balanced R6 <i>percentile rank</i> <i># of funds in category</i>	RLBGX	Moderate Allocation	26.27 14 743	7.25 9 694	9.65 17 655	8.77 10 497	✔️	12.13	0.98	25.76	✔️	—	✔️	0.25	✔️	3	1-Low	Low Risk