

PREVENTION RESEARCH INSTITUTE INC

Screens Summary (Data as of 03-31-2022)

⊖ 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	11.72 62 1,382	15.47 75 1,245	12.80 80 1,129	13.07 58 827	✓	16.61	0.93	30.10	✓	☒	✓	0.27	✓	2	-	Low Risk
Vanguard 500 Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VFIAX	Large Blend Index	15.60 17 1,382	18.89 19 1,245	15.95 16 1,129	14.60 9 827	✓	17.76	1.00	5.93	✓	☒	✓	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	8.82 26 400	15.67 15 361	13.00 10 319	12.94 10 210	✓	20.41	0.98	23.88	✓	☒	✓	0.05	✓	4	1-Low	Low Risk
Vanguard Small Cap Index Adm <i>percentile rank</i> <i># of funds in category</i>	VSMAX	Small Blend	0.68 58 635	13.16 43 603	11.34 14 543	12.11 12 360	✓	22.67	0.94	5.93	✓	☒	✖	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	-4.21 79 772	7.60 45 712	6.84 36 616	6.02 44 413	✓	18.94	1.11	13.50	✓	☒	✓	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	4.21 29 207	6.13 29 199	4.30 35 180	2.61 22 122	✓	4.05	0.93	10.62	✓	—	—	0.10	✓	3	-	-
Baird Aggregate Bond Inst <i>percentile rank</i> <i># of funds in category</i>	BAGIX	Intermediate-Term Bond	-4.46 56 434	2.04 23 394	2.45 16 359	2.90 10 259	✓	4.52	1.09	21.52	✓	☒	—	0.30	✓	3	1-Low	-
Lincoln Stable Value Account -LNGPA <i>percentile rank</i> <i># of funds in category</i>		Stable Value	- - 42	- - -	- - -	- - -	—	-	-	38.94	✓	—	—	-	-	-	-	-
Federated Hermes Govt Ultrashort R6 <i>percentile rank</i> <i># of funds in category</i>	FGULX	Ultrashort Bond	-0.46 38 236	0.91 55 214	1.19 66 176	- - 92	✓	0.57	0.06	24.74	✓	—	—	0.24	✓	-	-	-
Balanced																		
American Funds American Balanced R6 <i>percentile rank</i> <i># of funds in category</i>	RLBGX	Moderate Allocation	7.43 23 706	11.17 29 661	9.95 21 604	10.09 6 438	✓	10.54	0.94	23.26	✓	—	✓	0.25	✓	3	1-Low	Low Risk