

# PREVENTION RESEARCH INSTITUTE INC

## Screens Summary (Data as of 03-31-2026)

⊖ 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 Updated	Commit. Level Updated	Carbon Risk Updated
<b>US Stock</b>																		
American Funds Invmt Co of Amer R6 percentile rank # of funds in category	RICGX	Large Blend	18.51 25 1,457	20.42 7 1,349	13.03 8 1,250	13.52 39 987	✔	12.02	0.97	34.10	✔	☒	✔	0.27	✔	2	-	Low Risk
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	17.75 34 1,457	18.27 25 1,349	12.02 19 1,250	14.12 15 987	✔	12.06	1.00	8.34	✔	☒	✔	0.04	✔	3	1-Low	Low Risk
Vanguard Mid Cap Index Admiral percentile rank # of funds in category	VIMAX	Mid-Cap Blend	12.75 67 492	12.60 44 435	6.97 51 406	10.71 33 313	✔	14.64	0.95	2.66	✖	☒	✔	0.05	✔	4	1-Low	Medium Risk
Vanguard Small Cap Index Admiral Shares percentile rank # of funds in category	VSMAX	Small Blend	19.73 52 699	13.02 27 663	5.67 38 639	10.53 22 514	✔	17.36	0.88	9.93	✔	☒	✔	0.05	✔	4	1-Low	Medium Risk
<b>Non-US Stock</b>																		
American Funds Intl Gr and Inc R6 percentile rank # of funds in category	RIGGX	Foreign Large Blend	28.19 17 839	15.39 29 800	8.07 38 749	9.06 27 589	✔	12.39	0.91	17.51	✔	☒	✔	0.53	✔	3	1-Low	Low Risk
<b>Fixed Income</b>																		
Vanguard Inflation-Protected Secs Adm percentile rank # of funds in category	VAIPX	Inflation- Protected Bond	2.98 38 181	3.09 46 174	1.37 43 166	2.55 44 140	✔	4.30	1.01	4.39	✔	-	-	0.10	✔	3	-	-
Baird Aggregate Bond Inst percentile rank # of funds in category	BAGIX	Intermediate- Term Bond	4.35 41 551	4.12 24 515	0.55 22 468	2.12 18 345	✔	5.73	1.01	25.52	✔	☒	-	0.30	✔	4	1-Low	-
Lincoln Stable Value Account -LNGPA percentile rank # of funds in category		Stable Value	- - 38	- - -	- - -	- - -	-	-	-	42.94	✔	-	-	-	-	-	-	-
Federated Hermes Govt Ultrashort R6 percentile rank # of funds in category	FGULX	Ultrashort Bond	4.71 16 256	5.17 53 219	3.41 51 187	2.43 70 117	✔	0.62	0.10	28.74	✔	-	-	0.24	✔	-	-	-
<b>Balanced</b>																		
American Funds American Balanced R6 percentile rank # of funds in category	RLBGX	Moderate Allocation	17.76 8 541	14.65 5 517	8.86 4 499	9.82 8 419	✔	8.74	1.02	27.26	✔	-	✔	0.25	✔	3	1-Low	Low Risk