Sustainable, Responsible and Impact Mutual Fund and ETF Chart

**Fund Profile:**

**Praxis Genesis Balanced A**

**General Fund Information**

**Ticker:** MBAPX

**Assets under management (AUM):** $82.02M (in US$ millions)

**General Fund Type:** Balanced Funds

**Specific Sizes or Types of Investments:** --

**Financial Objective:** Balanced Asset Allocation Fund

**Specific ESG Focus:** Faith-based socially responsible investing

**To invest, call:** 800-348-7468

**Fund Institution Information**

**Institution Name:**

Praxis Mutual Funds

**Contact info:**


**Account Minimums**

**Minimum Account:** $1,000

**Minimum IRA:** $1,000

**Methodology**

**Screening Venue:** In-house and outside

**Screening Party:** MSCI ESG Data and Analysis

**Screening Database Used:** MSCI ESG Data and Analysis

**Screening Process:** Praxis Mutual Funds' Stewardship Investing Guidelines use a "positive magnet screening" process that evaluates companies based on their ability to reflect a set of six positive core values. By the reverse of this process, there are certain industries and activities which are deemed inconsistent with the core values and which are summarily avoided. Such industries include alcohol, gambling, tobacco, abortion-specific products, and military contracting. New companies are added to Praxis’s “social universe” of companies 1) following a successful research/conclusions at the request of fund managers, 2) when certain remedial actions are taken by a company bringing them in acceptable alignment with the Guidelines, or 3) at the recommendation of social research staff based on unusually high social
responsibility characteristics. Companies are removed from the Social Universe when information is received that moves the company's social evaluation outside of acceptable parameters to the Guidelines. Fund managers exercise complete discretion in investment decision-making, based on market realities and the needs of the portfolio.

**Proxy Voting Information**

Proxy Voting Guidelines or Policies: [Open external link in new window]

Proxy Voting Records: [Open external link in new window]

**Specific Screening Information by Category**

**Environment**
- Climate / Clean Technology: Positive Investment
- Pollution / Toxics: Positive Investment
- Other Environmental: Positive Investment

**Social**
- Community Development: Positive Investment
- Diversity & Equal Employment Opportunity: Positive Investment
- Human Rights: Positive Investment
- Labor Relations: Positive Investment

**Governance**
- Board Issues: Positive Investment
- Executive Pay: Positive Investment

**Products**
- Alcohol: No Investment
- Defense/Weapons: No Investment
- Gambling: No Investment
- Tobacco: No Investment

**Other**

**Performance Data**

Data provided by: Bloomberg - Information current as of January 31, 2020

Year-to-date rate of return: -0.3%
1-year rate of return: 12.41%
3-year rate of return: 7.97%
5-year rate of return: 6.09%
10-year rate of return: 7.3%
Previous year rate of return: 18.54%
Management fee: 0.05%
Expense ratio: 0.52%
Standard deviation: 6.39%

Benchmark used: Russell 3000

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