



The Forum for Sustainable and Responsible Investment

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Sustainable, Responsible and Impact Mutual Fund and ETF Chart

Fund Profile:

Praxis Intermediate Income A

General Fund Information

Ticker: MIIAX

Assets under management (AUM): \$510.79M (in US\$ millions)

General Fund Type: Bond (Fixed Income)

Specific Sizes or Types of Investments: Wide range of notes & bonds issued by US govt. and corporations, and mortgage-backed securities.

Financial Objective: Seeks current income with capital appreciation as a secondary objective.

Specific ESG Focus: --

To invest, call: 800-348-7468

Fund Institution Information

Institution Name:

Praxis Mutual Funds

Contact info:

Web: <http://www.everence.com/showitem2.aspx?id=307>

Account Minimums

Minimum Account: \$2,500

Minimum IRA: --

Methodology

Screening Venue: In-house and outside

Screening Party: Praxis Social Research Staff

Screening Database Used: MSCI ESG Data & Analysis

Screening Process: Praxis Mutual Fund's 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 Mutual Fund'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

- **Other Environmental:** *Positive Investment*

Social

- **Community Development:** *Positive Investment* - 1% of portfolio in community investments.
- **Diversity & Equal Employment Opportunity:** *Positive Investment*
- **Human Rights:** *Positive Investment*
- **Labor Relations:** *Positive Investment*

Governance

Products

- **Alcohol:** *No Investment*
- **Animal Welfare:** *Restricted/Exclusionary Investment* - Careful consideration given to the abusive treatment of animals.
- **Defense/Weapons:** *No Investment*
- **Gambling:** *No Investment*
- **Tobacco:** *No Investment*

Other

Performance Data

Data provided by: Bloomberg - Information current as of February 28, 2019

Year-to-date rate of return: 0.98%

1-year rate of return: 2.51%

3-year rate of return: 1.36%

5-year rate of return: 1.88%

10-year rate of return: 3.77%

Previous year rate of return: -0.36%

Management fee: 0.4%

Expense ratio: 0.98%

Standard deviation: 2.5%

Benchmark used: Barclays Capital US Aggregate

Disclaimer: You should consider the fund's investment objectives, risks and charges and expenses carefully before you invest. The fund's prospectus contains this and other information. Call (800) 977-2947 or visit www.praxismutualfunds.com for a prospectus, which you should read carefully before you invest. Praxis Mutual Funds are advised by Everence Capital Management and distributed through FINRA member BHIL Distributors Inc. Investment products offered are not FDIC insured may lose value and have no bank guarantee.

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