



Crossmark's Steward Global Equity Income Fund Awarded 2024 LSEG Lipper Award

Houston, Texas - March 14, 2024 - Crossmark Global Investments, a faith-based investment management firm, is proud to announce that its Steward Global Equity Income Fund Institutional Share Class (SGISX) has received a Lipper Award for the tenth consecutive year. Presented by the London Stock Exchange Group (LSEG), the award highlights the fund's 10-year outperformance versus peers in its category.

The Fund seeks to provide investors with current income along with growth of capital. The Fund utilizes a four-step process that combines dividend income with relative risk-controlled portfolio construction, and investments have been screened to align with widely-held traditional values in accordance with the fund's values-based screens.

"We are grateful for this recognition, and we are proud to provide clients with a faith-based fund that has consistently outperformed," said Bob Doll, CEO and CIO at Crossmark. "This award furthers our belief that investors do not have to compromise their investment returns in order to find products that align with their values."

The LSEG Lipper Fund Awards highlight funds that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The awards are based on the Lipper Leader for Consistent Return rating, which is an objective, quantitative, risk-adjusted performance measure calculated over 36, 60 and 120 months.

"The 2024 LSEG Lipper Fund Awards are recognizing perhaps the most dramatic three-year period that the markets have seen in decades. Fund managers being recognized have steered their investors through a pandemic, a mild recession, a war, skyrocketing inflation and dramatic central bank intervention. We applaud the 2024 LSEG Lipper Fund Award winners such as Crossmark Global Investments for delivering outperformance and the accompanying comfort of consistency to investors' portfolios through a cross-current of global market disruptions," said Robert Jenkins, Global Head of Research, Investment & Wealth LSEG Lipper.

The Lipper Fund Awards from LSEG Lipper recognized the Steward Global Equity Income Fund at the U.S. Lipper Fund Awards on March 14, 2024, for delivering consistently strong risk-adjusted performance relative to its peers in the Global Equity Income Fund category for the 10-year period ending Nov. 30, 2023. The number of peer funds included in the category was 21 for the 10-year period. The award is based on the fund achieving the highest Lipper Leader for Consistent Return value (effective return net of expenses) over the stated time period. Based on Lipper's quantitative, proprietary methodology, the awards reflect an assessment of fund performance.

About Crossmark Global Investments:

Crossmark Global Investments, a faith-based investment firm offering values-based strategies, is headquartered in Houston, Texas. The firm reported \$6.2 billion in AUM as of December 31, 2023 via both separately managed accounts and the Steward family of mutual funds invested across equity, fixed income, liquid alternative, and derivative income asset classes. For more information, visit www.crossmarkglobal.com.

The Steward Funds are distributed by **Crossmark Distributors, Inc., member FINRA**, an affiliate of Crossmark. Crossmark Distributors is an affiliate of Crossmark Global Investments, Inc., the Steward Funds' investment adviser. Crossmark Global Investments is an investment adviser registered with the Securities and Exchange Commission that provides discretionary investment management services to mutual funds, institutions, and individual clients. **All Investments are subject to risks, including the possible loss of principal. Past performance does not guarantee future results.**

Before investing in a mutual fund, you should read the fund's prospectus carefully and consider the fund's investment objectives, risks, charges and expenses. The prospectus contains this and other information about the fund. A copy of the Steward Funds' prospectus may be obtained free of charge by calling Crossmark Distributors at 888-845-6910. Past Performance does not guarantee future results.

The Fund may not achieve its objective if the managers' expectations regarding particular securities or markets are not met. Equity investments generally involve two principal risks—market risk and selection risk. The value of equity securities will rise and fall in response to general market and/or economic conditions (equity market risk). The value of any individual equity security will rise and fall in response to the market's perception of the issuer's revenues, earnings, balance sheet, credit worthiness, business plan, and overall perception of the viability of the issuer's business (selection risk).

Investments in securities of issuers in foreign countries involves additional risks not associated with domestic investments. These risks include, but are not limited to: (1) political and financial instability; (2) currency exchange rate fluctuations; (3) greater price volatility and less liquidity in particular securities and in certain foreign markets; (4) lack of uniform accounting, auditing, and financial reporting standards; (5) less government regulation and supervision of some foreign stock exchanges, brokers and listed companies; (6) delays in transaction settlement in certain foreign markets; (7) less availability of information; and (8) imposition of foreign withholding or other taxes.

The Fund's values-based screening policies exclude certain securities from the universe of otherwise available investments. As a result, the Fund may not achieve the same performance it otherwise may have in the absence of the screening process. If the Fund has invested in a company that is later discovered to be in violation of one or more screening criteria and liquidation of an investment in that company is required, selling the securities at issue could

result in a loss for the Fund. Further, the Fund's values-based screening policies may prevent the Fund from participating in an otherwise suitable investment opportunity.

Investment return and principal value will fluctuate so that shares, when redeemed, may be worth more or less than their original cost. The Fund's current performance may be lower or higher than quoted.

About LSEG Lipper Fund Awards:

For more than 30 years and in over 17 countries worldwide, the highly-respected LSEG Lipper Awards have honored funds and fund management firms that have excelled in providing consistently strong risk-adjusted performance relative to their peers and focus the investment world on top-funds. The merit of the winners is based on entirely objective, quantitative criteria. This coupled with the unmatched depth of fund data, results in a unique level of prestige and ensures the award has lasting value. Renowned fund data and proprietary methodology is the foundation of this prestigious award qualification, recognizing excellence in fund management. Find out more at www.lipperfundawards.com.

The ***LSEG Lipper Fund Awards***, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers.

The *LSEG Lipper Fund Awards* are based on the *Lipper Leader for Consistent Return* rating, which is an objective, quantitative, risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest *Lipper Leader for Consistent Return* (Effective Return) value in each eligible classification wins the *LSEG Lipper Fund Award*. For more information, see lipperfundawards.com. Although LSEG Lipper makes reasonable efforts to ensure the accuracy and reliability of the data used to calculate the awards, their accuracy is not guaranteed.

The *LSEG Lipper Fund Awards* do not constitute and are not intended to constitute investment advice or an offer to sell or the solicitation of an offer to buy any security of any entity in any jurisdiction. *LSEG Lipper Fund Awards* designations are for information purposes only. LSEG Lipper is not responsible for the accuracy, reliability or completeness of the information obtained to calculate the awards. Consequently, LSEG Lipper will not be liable for any loss or damage resulting from information obtained from Lipper or any of its affiliates. Past performance is not a guarantee of future results.

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