

# Crossmark Global Investments Announces Launch of Five New Steward Mutual Funds



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**Crossmark Global Investments →**

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HOUSTON, Jan. 25, 2022 /PRNewswire/ -- Crossmark Global Investments, a faith-based firm that creates, manages, and distributes values-based investment strategies, is pleased to announce the launch of five new mutual funds to the existing line-up of Steward Funds. Crossmark now offers eleven total Steward Mutual Funds across equity and fixed income sectors that provide values-based screens for investors who wish to align their values with their investments.

The expanded lineup includes five new funds: Steward Large Cap Core Fund (Institutional: SJCIX), Steward Large Cap Growth Fund (Institutional: SJGIX), Steward Large Cap Value Fund (Institutional: SJVIX), Steward Equity Market Neutral Fund (Institutional: SMNIX), and Steward Small Cap Growth Fund (Institutional: SKGIX).

The lead portfolio managers for the new funds, Bob Doll and Brent Lium, bring decades of investing and asset allocation experience and are both Chartered Financial Analyst charterholders. Mr. Doll, Chief Investment Officer at Crossmark, has spent over 40 years of his career developing his large-cap equity investment process while serving as Chief Equity Strategist and Chief Investment Officer at firms including Nuveen, Blackrock, and Merrill Lynch Investment Managers. Mr. Lium, Head of Equity Investments at Crossmark, has dedicated the last 20 years of his career as an equity analyst, and portfolio manager with a focus on the small- and mid-cap equity sectors at Invesco.

"Crossmark believes that people are most fulfilled when their actions align with their values, and we see that play out as demand for values-based investments continues to grow," says Mr. Doll, CIO of Crossmark Global Investments. "This new lineup enables investors to select strategies across a broader range of asset classes providing a greater opportunity to design a comprehensive, values-based portfolio."

According to Morningstar, investors put \$51.1 billion of net new money into socially responsible investments in 2020 – the fifth year in a row of record-breaking investments. The Steward strategies not only incorporate exclusionary screening to avoid companies that don't align with traditionally-held values, but they also provide inclusionary screening capabilities to increase the allocation of those companies that strive to do good. The combination of both exclusionary and inclusionary screening allows the funds to better meet the needs of those looking for values-focused investment solutions.

"We're excited about the addition of these Steward Mutual Funds to our product line-up," says Mr. Lium, Head of Equity Investments at Crossmark Global Investments. "With our unique exclusionary and inclusionary screening processes, these strategies are held to a high ethical standard, and will allow our clients to match their investments with their values," he says.

### **About Crossmark Global Investments:**

Crossmark Global Investments is a faith-based firm that creates, manages, and distributes values-based investment strategies that equip financial intermediaries and their clients to align their wealth with their convictions. For over 30 years, the firm has delivered uniquely constructed products based on its proprietary, disciplined, and repeatable process. Founded in 1987, the firm is headquartered in Houston, Texas. For more information visit: [www.crossmarkglobal.com](http://www.crossmarkglobal.com).

The Steward Funds are distributed by **Crossmark Distributors, Inc., member FINRA**. Crossmark Distributors is an affiliate of Crossmark Global Investments, Inc., the Steward Funds' investment adviser.

**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's values-based screening policies exclude certain securities issuers from the universe of otherwise available investments. As a result, the Fund may not achieve the same level of performance as it otherwise would 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 to the Fund. Further, the Fund's values-based screening policies may prevent the Fund from participating in an otherwise suitable investment opportunity. With respect to Steward Equity Market Neutral Fund, the values-based screening policies apply only to long positions.

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