



Two Crossmark Values-Based Steward Funds Receive 2025 LSEG Lipper Awards

Houston, Texas – March 25, 2025 – Crossmark Global Investments, a faith-based investment management firm, is pleased to announce the Steward Global Equity Income Fund (SGISX) and Steward Covered Call Income Fund (SCJIX) received 2025 LSEG Lipper Fund Awards, presented by LSEG.

The Steward Global Equity Income Fund received an award for the 10-year period ending Nov. 30, 2024, in the Global Equity Income Funds category, the 11th consecutive year the fund has been recognized. The number of peer funds included in the category was 19. The fund seeks growth of capital through investments in U.S. and non-U.S. dividend-paying stocks, subject to the limitations of the fund's values-based screening policies.

The Steward Covered Call Income Fund was recognized for its 5-year performance ending Nov. 30, 2024, in the Options Arbitrage/Opt Strategies category, marking the first year of recognition for this fund. The number of peer funds included in the category was 15. The fund seeks to invest dividend income and options premium income securities, with the potential for capital appreciation and less volatility than the broad equity market.

Each investment within Crossmark's mutual funds is screened to exclude companies materially involved with alcohol, tobacco, gambling, mature content, and other values-based restrictions. The screening process is applied across Crossmark's values-based equity and fixed income strategies that together constitute the Steward Family of Funds.

"As investor demand for values-based investing continues to rise, we're proud to offer strategies that provide strong returns without compromising on beliefs," said Crossmark's CEO/CIO Bob Doll, CFA. "We're grateful for these awards from LSEG, and their recognition of our commitment to outperformance amid a constantly evolving market."

"We applaud the 2025 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 Otto Christian Kober, Head of Lipper Research, LSEG Data & Analytics.

The LSEG Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is a 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 makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, their accuracy is not guaranteed by LSEG Lipper. More information on methodology can be found at this [link](#).



About Crossmark Global Investments

Crossmark Global Investments is a faith-based investment management firm that creates and manages values-based investment strategies with a goal of providing performance excellence for financial intermediaries and their clients. Founded in 1987, the firm specializes in developing tailored solutions and has a rich history of inspiring and equipping its clients to align their investments with their values.

To learn more about Crossmark, visit the firm's website, crossmarkglobal.com, or [LinkedIn page](#).

Crossmark Global Investments Inc. (Crossmark) is an investment adviser registered with the Securities and Exchange Commission that provides discretionary investment management services to mutual funds, institutions, and individual clients. Investment advice can be provided only after the delivery of Crossmark's firm Brochure and Brochure Supplement Form ADV (Parts 2A and 2B) and Form CRS, and once a properly executed investment advisory agreement has been entered into by the client.

The Steward Funds are distributed by **Crossmark Distributors, Inc.**, member FINRA, an affiliate of Crossmark. **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.**

All investments are subject to risks, including the possible loss of principal.

Past performance does not guarantee future results.

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.

Options are not suitable for every investor. Writing call options to generate income and to potentially hedge against market declines by generating option premiums involves risk. If the market price of a security increases, a call option written against that security limits the gain that can be realized. And there can be significant differences between the securities and options markets that could result in an imperfect correlation between these markets, causing a given transaction not to achieve its objectives.

The funds' values-based screening policies exclude certain securities from the universe of otherwise available investments. As a result, the funds may not achieve the same performance they otherwise may have in the absence of the screening process. If the funds have 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 funds' values-based screening policies may prevent the funds from participating in an otherwise suitable investment opportunity.

About LSEG Lipper Fund Awards

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 a risk-adjusted performance measure calculated over three, five, and ten years. The fund with the highest Lipper Leader for Consistent Return (Effective Return Net of Expenses) value in each eligible classification wins the LSEG Lipper Fund Award.

For more information, see lipperfundawards.com. Although LSEG makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, their accuracy is not guaranteed by LSEG Lipper.