Crossmark Global Investments Launches Two Active Values-Based ETFs, Managed by Industry Veteran Bob Doll

Houston, TX - July 23, 2025 - Crossmark Global Investments, a faith-based investment management firm offering values-based strategies, has launched two actively managed exchanged-traded funds (ETFs): Crossmark Large Cap Growth ETF (ticker: CLCG) and Crossmark Large Cap Value ETF (ticker: CLCV).

These products mark the firm's debut in the ETF space, driven by investor demand for actively managed funds with Crossmark's exclusionary and inclusionary values-based screening process, in a transparent ETF wrapper. They will be managed by Bob Doll, CFA, Portfolio Manager, CIO, and CEO of Crossmark, and co-managed by Ryan Caylor, CFA, Portfolio Manager and Crossmark's Head of Research.

The funds will mimic the investment strategies of the firm's separately managed accounts managed by the team, and portfolio managers will work to identify high-conviction securities through a combination of fundamental and quantitative factors, values-based criteria, prudent portfolio constraints, and risk management tools, with the goal to seek long-term capital appreciation.

Crossmark Large Cap Growth ETF seeks to outperform the Russell 1000 Growth Index through investments in the large cap growth segment of the U.S. equity universe, and Crossmark Large Cap Value ETF aims to outperform its benchmark, the Russell 1000 Value Index, by identifying resilient value securities.

"We have always strongly believed that investors do not need to compromise on personal values in order to invest in outperforming strategies," said Bob Doll, CFA, Portfolio Manager, CEO, and CIO at Crossmark. "Not only does our screening process exclude companies that have negative business practices or corporate governance concerns, but we also have the ability to actively include companies that work to reduce risk and build long-term resilience through responsible business practices."

"Moving into the ETF space was a natural next step in our firm's progression," said Heather Lindsey, Head of Distribution at Crossmark. "These ETFs offer investors an accessible tool for actively managed investment solutions while satisfying demand for values-based investment options."

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.

Crossmark is indirectly owned by a non-profit organization, and our net income supports multiple ministry programs. We believe in the power of giving back and making a positive impact on the world we live in.

To learn more, visit Crossmark's website, crossmarkglobal.com, or LinkedIn page.

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An investor should consider the investment objectives, risks, charges, and expenses of the funds carefully before investing. The prospectus and, if available, the summary prospectus contain this and other information about the funds. You may obtain a prospectus and, if available, a summary prospectus by downloading from crossmarkglobalETF.com or calling Crossmark toll-free at 888-845-6910. Please read the prospectus or summary prospectus carefully before investing.

The funds may not achieve their objectives 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 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 funds. Further, the funds' values-based screening policies may prevent the funds from participating in an otherwise suitable investment opportunity.

The funds' investment adviser considers positive value characteristics when making investment decisions. There is a risk that the funds may forgo otherwise attractive investment opportunities or increase or decrease exposure to certain types of issuers and, therefore, may underperform strategies that do not consider the same or any positive value characteristics. A company's positive value characteristics are determined based on data and rankings generated by one or more third-party providers unaffiliated with the adviser, and such information may be unavailable or unreliable. Additionally, investors can differ in their views of what constitutes positive value characteristics. As a result, the funds may invest in issuers that do not reflect or support, or that act contrary to, the values of any particular investor.

The funds are subject to management risk because they are actively managed investment portfolios. The adviser will apply investment techniques and risk analyses in making investment decisions for the funds, but there can be no guarantee that these will produce the desired results.

There can be no assurance that the quantitative models used in managing the funds will perform as anticipated or enable the funds to achieve their objectives.

The funds are classified as non-diversified under the Investment Company Act of 1940, as amended. This means that the funds may invest in securities of relatively few issuers.

Investments in large cap companies and in growth stocks are subject to the risks of equity securities.

An investment in the funds involves risk, including possible loss of principal. ETFs trade like stocks, are subject to investment risk, fluctuate in market value and may trade at prices above or below the ETF's net asset value (NAV), and are not individually redeemable directly with the ETF. Brokerage commissions and ETF expenses will reduce returns. ETFs are subject to specific risks, depending on the nature of the underlying strategy of the funds. These risks also include value stocks risk, market disruption and geopolitical risk, inflation risk, issuer risk, small- and mid-cap companies risk, other investment companies or real estate investment trust risk, focus risk, concentration policy risk, market price risk, small fund risk, and authorized participant concentration risk. **For a complete description of the funds' principal investment risks, please refer to the prospectus.**

Past performance does not guarantee future results.

The **Russell 1000® Growth Index** measures the performance of the large cap growth segment of the U.S. equity universe. It includes those Russell 1000 companies with relatively higher price-to-book ratios, higher I/B/ E/S forecast medium term (2 year) growth and higher sales per share historical growth (5 years).

The **Russell 1000® Value Index** measures the performance of the large cap value segment of the U.S. equity universe. It includes those Russell 1000 companies with relatively lower price-to-book ratios, lower I/B/E/S forecast medium-term (two-year) growth, and lower sales per share historical growth (five years).

Indexes are unmanaged, do not incur management fees, costs, and expenses, and cannot be invested in directly.

Not FDIC Insured — No Bank Guarantee — May Lose Value

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