

Catholic Responsible Investments Funds

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*Unifying  
Faith and Finance  
in a Single Structure*

# *Catholic Responsible Investments Funds and Defined Contribution Plans*

As a trusted partner to Catholic investors around the world, CBIS is committed to providing retirement plan sponsors and their participants with competitive Catholic investment options through CBIS' Catholic Responsible Investments Funds (CRI Funds).

At CBIS, our Investment Team recognizes experienced money managers and carefully integrates their unique capabilities into a single fund. Key to our integrated managers approach is our conviction that investment managers can be identified that generate above-market performance over the long term.

The CRI Funds — nine CRI single-asset funds and four multi-asset funds of funds — combines investment managers with unique and complementary styles, while integrating

the Catholic Responsible Investments approach into the investment process.

## **CRI Single-Asset Funds**

A full range of equity and fixed income strategies that combine the investment expertise of multiple investment managers with CBIS' Catholic Responsible Investments approach.










## **CRI Magnus Funds**

A series of multi-asset risk-based strategies built to provide comprehensive asset management and disciplined rebalancing in a turnkey fund. Each Magnus offering is a “fund of funds” seeking to achieve its objective by combining single-asset Catholic Responsible Investments Funds.



## **Why Consider CBIS' CRI Funds?**

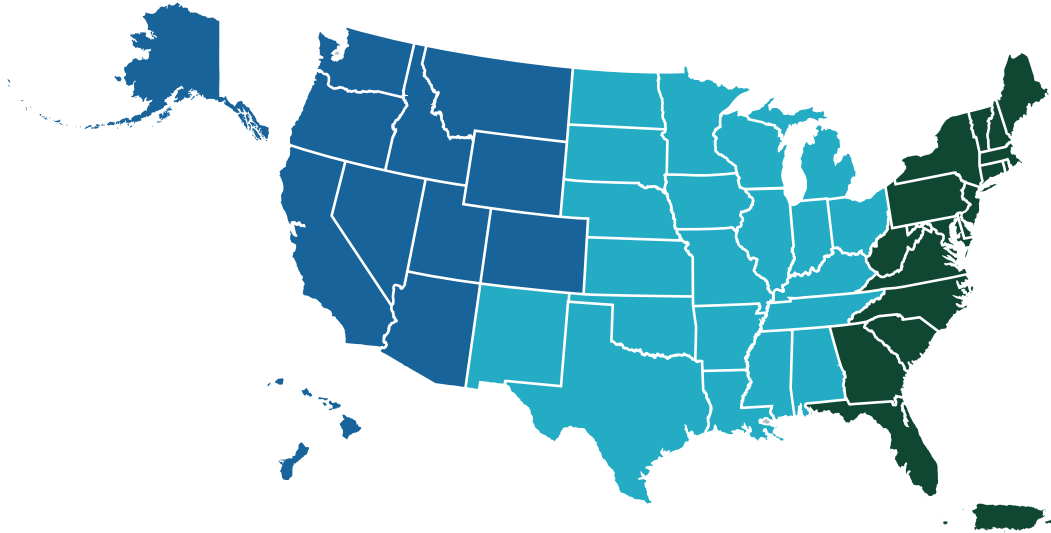
- Long-term performance and risk management record
- Aligned with USCCB Socially Responsible Investment Guidelines
- Competitive pricing and fee structure
- Pure products with competitive returns

Asset Class	Fund Category	Fund Category Adoption Rates by Large Retirement Plans*	CRI Fund	Ticker
Global Equity	US Active		CRI Multi-Style US Equity	CRTSX
	US Passive		CRI Equity Index CRI Small Cap	CRQSX CRSSX
	International Equity		CRI International Equity CRI International Small-Cap	CRLSX CRNSX
Multi-Asset Funds	Target Date		None	--
	Target Risk		CRI Magnus 75/25 CRI Magnus 60/40 Alpha Plus CRI Magnus 60/40 Beta Plus CRI Magnus 45/55	CMUSX CMPSX CMMSX CMNSX
Bond Funds	Domestic Bond		CRI Ultra Short Bond CRI Short Duration Bond CRI Bond CRI Opportunistic Bond	CRHSX CRDSX CRBSX CROX
	International Bond		None	--
Other Options	Stable Value		None	--
	Money		None	--
	Other		None	--

\*2022 ICI Factbook - % of 401(k) filings in the Brightscope database, 2018

## Contact Us

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## Important Information

Before investing you should carefully consider the new Catholic Responsible Investments Funds' investment objectives, risks, charges and expenses. This and other information is available in the prospectus, or summary prospectus. Please read the prospectus carefully before you invest. The prospectus, or summary prospectus, can be obtained by calling 1-866-348-6466.

Mutual fund investing involves risk, including possible loss of principal. There can be no assurance that the Fund will achieve its stated objectives. Current and future holdings are subject to risk.

The funds are distributed by SEI Investments Distribution Company (SIDCO). SIDCO is not affiliated with CBIS or any sub-advisers of the Funds.