

Dimensional's Approach to Socially Screened Investing

Start with sound investment principles.

- Target higher expected return securities.
 - Maintain a consistent focus on the desired asset class.
 - Control for costs, such as those related to turnover, without sacrificing diversification.
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Develop a meaningful way to screen for client-driven social concerns.

- Engage leading firms and experts to provide top-tier screening criteria and screening implementation.
 - Where appropriate, use multiple vendors in order to ensure depth and transparency of the scores.
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Our goal is to provide a socially screened strategy that offers the benefits of Dimensional's investment philosophy.

Social Screens

SOCIAL SCREENS INCLUDE:

Abortions, Abortive Agents, and Contraceptives

Adult Entertainment

Child Labor

Civilian Firearms

Gambling

Landmines and Cluster Munitions

Republic of the Sudan

Stem Cell Research

Tobacco or Alcohol

Weapons

- Dimensional employs an independent social screen vendor to identify stocks for exclusion on social issues.
- The social screen research examines the business activities of companies across several areas.