

TheBlueFund

Blue Basics: A Quick Overview

Who We Are

The Blue Fund invests in companies that both “act blue” and “give blue.” We build our portfolios on core Democratic values like environmental sustainability, community participation and respect for human rights. And then we go a step further, investing only in those companies whose political contributions demonstrate a sincere commitment to these values.

What We Believe

- We believe that politics matter, and that progressive investors deserve a chance to put their dollars to work in a way that reflects their political values.
- We believe that ethical investing can be achieved without sacrificing competitive returns
- We believe living your values means never having to compromise what you stand for

Why It Matters

Shareholders are the true owners of public companies and bear responsibility for corporate behavior, from products to political contributions. More than two thirds of S&P 500 and Russell 2000 political contributions went to Republican candidates over the last four election cycles. Because we screen carefully for companies that both “act blue” and “give blue”, The Blue Fund works to create investments that reflect progressive values.

The Blue Fund’s Unique Perspective

- **Politically conscious.** Our portfolio has a conscience, investing only in companies who put their money where their heart is by donating a majority of their political contributions to progressive candidates.
- **Socially responsible.** All companies in our portfolio pass screens for environmental sustainability, responsible corporate governance, respect for human rights at home and abroad, diversity in the workforce, fair treatment of all employees and avoidance of products that cause great social harm, including firearms and tobacco.

- **Driven by research.** Our research team evaluates 2,500 companies, selecting only those that “act blue” and “give blue”. We monitor all political contributions by senior executives and political action committees affiliated with companies in the S&P 500 and Russell 2000 indexes.
- **Power in numbers.** Republicans receive more than twice as much corporate money as Democrats.* As shareholders, we are dedicated to amplifying and reinforcing the success of blue companies, checking the flow of corporate donations to Republican interests, and promoting higher standards of transparency and accountability.
- **Committed to value.** With no loads, diversified holdings, and a rigorous screening process, The Blue Fund is designed to provide the progressive investor with an opportunity for competitive returns.

* Statistics compiled by Blue Investment Management using publicly available records from the FEC. Statistics represent federal-level political donations from each company's Top 3 executives and each company's corporate PAC from the 1998 election cycle through the present. For more information on methodology, please visit [Blue Investment Management](#).

For more complete information on The Blue Fund, request a prospectus by calling 1-877-490-BLUE or [download a prospectus](#). The Fund's investment objectives, risks, charges and expenses, and other important information are contained in the prospectus. You should read and consider this information carefully before you invest or send money because mutual fund investing can involve risk, including loss of principal.

Blue Investment Management, LLC is the Investment Adviser for the Funds. The Blue Fund is distributed by BISYS Fund Services Limited Partnership. Blue Investment Management, LLC and BISYS Fund Services Limited Partnership are not affiliated.