

Boston Trust Walden

FUND FACTS

FUND PERFORMANCE

INVESTMENT OBJECTIVE & STRATEGY

through an actively managed portfolio of equity and fixed

seeks to construct a diversified portfolio of reasonably valued equity and fixed income securities of higher quality

Asset Allocation

Asset allocation can be the foremost determinant of total

global economic scenarios, the Adviser sets policy intended

Segment Composition

Within both the equity and fixed income segments, the Adviser makes judgments about portfolio composition intended to both enhance return and manage risk. These

Security Selection

Equity
of higher quality companies at reasonable prices. Higher quality companies are those judged to have sustainable business models, financial stability, prudent capital management, and financial statements that indicate past

diversified across economic sectors.

Fixed Income—Fixed income holdings are generally those issued by either the US government and its agencies,

ASSET ALLOCATION

EQUITY SECTOR ALLOCATION



Financials

Health
Care

Industri

FUND RISKS

Equity securities (stocks) are generally more volatile and carry more risk than fixed income securities (bonds) and money market investments. The net asset value per share of this Fund will fluctuate as the value of the securities in the portfolio changes. Common stocks, and funds investing in common