



Screening Tools Overview



Screening Tool	Individual Stocks	Stock Mutual Funds	Stock ETFs	Bonds, Bond Mutual funds / ETFs	Private Companies	Annuity Subaccounts	UIT s
BRI Institute	X				X		
ENSOGO Analytics		X	X				
eVALUEator	X	X	X	X	X	X	
Inspire Insight	X	X	X				X

Screening tools can be helpful for gathering behind-the-scenes understanding, but if a result surprises you, contact the fund to learn the story behind the screening results. Also, screening tool reports are not compliance approved for sharing with clients.