





# WESTMORELAND ELECTRIC INC 401K

## Screens Summary (Data as of 12-31-2019)

⊖ Fund Removed from Approved List    ⚠ Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management			Style		Expense			
			1 Yr	3 Yr	5 Yr	10 Yr	Pass/ Fail	Std Dev 3 Yr %	Beta 3 Yr %	Tenure	Pass/ Fail	Style Box	Pass/ Fail	Exp Ratio	Pass/ Fail
American Funds 2030 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFETX	Target Date	20.06 60 242	10.86 4 207	8.07 1 165	9.88 1 95	✔	7.68	0.99	12.92	✔	—	✔	0.35	✔
American Funds 2035 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFCTX	Target Date	23.29 21 230	12.28 1 194	8.99 1 155	10.34 1 80	✔	9.14	1.02	12.92	✔	—	✔	0.37	✔
American Funds 2040 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFCTX	Target Date	24.40 28 242	12.76 1 207	9.30 1 165	10.54 1 95	✔	9.66	0.97	12.92	✔	—	✔	0.38	✔
American Funds 2045 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFHTX	Target Date	24.68 51 230	12.96 2 194	9.45 1 155	10.62 1 79	✔	9.89	0.95	12.92	✔	—	✔	0.38	✔
American Funds 2050 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFITX	Target Date	25.04 43 242	13.11 2 207	9.55 1 165	10.68 1 77	✔	10.02	0.95	12.92	✔	—	✔	0.39	✔
American Funds 2055 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFKTX	Target Date	25.09 45 230	13.11 2 192	9.54 1 150	— — 15	✔	10.05	0.95	9.92	✔	—	✔	0.40	✔
American Funds 2060 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFUTX	Target Date	25.01 60 216	13.05 3 147	— — 34	— — —	✔	10.02	0.94	4.77	✔	—	✔	0.41	✔

### Balanced

⚠ BlackRock Global Allocation Instl <i>percentile rank</i> <i># of funds in category</i>	MALOX	World Allocation	17.54 40 469	7.35 51 389	5.01 40 331	5.79 62 193	✔	6.93	0.99	16.01	✔	🇺🇸	✔	0.80	✔
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