

CAMPAIGN LEGAL CENTER INC 401K

Screens Summary (Data as of 12-31-2022)

⊖ Fund Removed from Approved List ⚠ Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management			Style	Expense			ESG Metrics				
			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	Sustain. Rating	Commit. Level	Carbon Risk
US Stock																		
Vanguard Dividend Growth Inv	VDIGX	Large Blend	-4.88	9.99	11.79	12.96	✓	18.06	0.81	16.92	✓	📊	✓	0.27	✓	4	2-Basic	Low Risk
<i>percentile rank</i>			2	4	2	5												
<i># of funds in category</i>			1,379	1,247	1,137	837												

Vanguard 500 Index Admiral	VFIAX	Large Blend Index	-18.15	7.62	9.39	12.52	✓	21.17	1.00	6.68	✓	📊	✓	0.04	✓	3	1-Low	Low Risk
<i>percentile rank</i>			52	33	25	13												
<i># of funds in category</i>			1,379	1,247	1,137	837												

Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	-18.71	6.17	7.32	11.10	✓	23.61	0.98	24.63	✓	📊	✓	0.05	✓	4	1-Low	Medium Risk
<i>percentile rank</i>			86	56	30	17												
<i># of funds in category</i>			413	378	350	227												

DFA US Small Cap I	DFSTX	Small Blend	-13.53	7.88	5.84	10.14	✓	25.76	0.95	10.85	✓	📊	✓	0.27	✓	3	-	Medium Risk
<i>percentile rank</i>			23	15	32	21												
<i># of funds in category</i>			627	600	558	375												

Non-US Stock																		
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	-15.16	0.36	2.06	4.28	✓	21.51	1.08	14.26	✓	📊	✓	0.54	✓	2	1-Low	Low Risk
<i>percentile rank</i>			44	56	22	48												
<i># of funds in category</i>			763	723	630	440												

Fixed Income																		
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	-11.89	1.09	1.96	1.00	✓	6.84	0.97	1.15	✖	—	—	0.10	✓	3	-	-
<i>percentile rank</i>			54	53	52	43												
<i># of funds in category</i>			217	204	195	138												

Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	-13.35	-2.48	0.25	1.49	✓	6.23	1.05	22.27	✓	📊	—	0.30	✓	3	1-Low	-
<i>percentile rank</i>			49	31	22	9												
<i># of funds in category</i>			471	423	389	289												

Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	0.45	0.63	1.19	-	✓	0.59	0.06	25.49	✓	—	—	0.24	✓	-	-	-
<i>percentile rank</i>			38	44	60	-												
<i># of funds in category</i>			237	218	180	107												

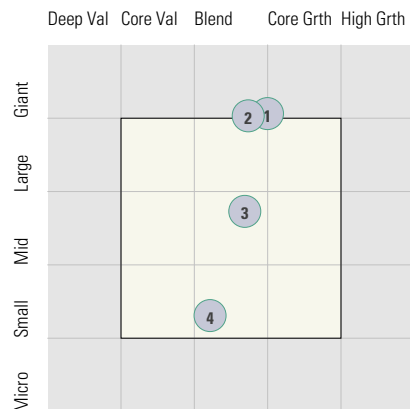
Balanced																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	-11.83	4.42	5.84	8.59	✓	13.31	0.95	24.01	✓	—	✓	0.25	✓	2	1-Low	Low Risk
<i>percentile rank</i>			24	18	17	5												
<i># of funds in category</i>			758	698	658	495												

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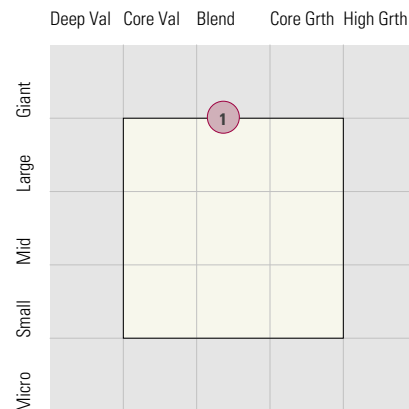
Style Analysis (Data as of 12-31-2022)

Style Analysis

Morningstar Style Box US Stock



Morningstar Style Box Non-US Stock



● US Stock Funds		Super Sectors %			Asset Allocation %			
	Category	Cyclical	Defensive	Sensitive	Cash	US Stock	Foreign	Avg Mkt Cap M\$
1	Vanguard Dividend Growth Inv	34.24	34.55	31.20	2.97	87.92	9.11	156.30
2	Vanguard 500 Index Admiral	28.67	26.71	44.61	0.33	98.54	1.12	161.35
3	Vanguard Mid Cap Index Admiral	36.29	23.70	40.00	1.15	97.41	1.44	22.38
4	DFA US Small Cap I	40.36	18.25	41.40	0.62	97.70	1.66	2.60

● Non-US Stock Funds		Super Sectors %			Regional Exposure %			Market Maturity %		
	Category	Cyclical	Defensive	Sensitive	Americas	Greater Asia	Greater Europe	Developed	EM%	Avg Mkt Cap M\$
1	American Funds Intl Gr and Inc R6	37.80	26.38	35.82	14.47	28.83	56.70	85.71	14.29	45.50

● Fixed Income Funds		Super Sectors %				Other Stats		Credit Quality %		
	Category	US Govt Debt	Mtg	US Credit	Non US	Avg Eff Duration	Inv Grade	Below Inv Grade	NR/NA	
1	Vanguard Inflation-Protected Secs Adm	95.86	0.00	0.00	0.00	6.54	95.88	0.00	4.12	
2	Baird Aggregate Bond Inst	25.92	25.01	47.20	0.00	6.17	99.70	0.30	0.00	
3	Federated Hermes Govt Ultrashort R6	7.01	31.43	0.00	0.00	0.30	100.00	0.00	0.00	