

BUCKTAIL MEDICAL CENTER 403B PLAN

Screens Summary (Data as of 12-31-2024)

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/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |         |         |
|                                                                                       |        |                           |                               |                     |                      |             |               |                   |                |            |               |              |               |              |               |                    |                  | Updated        | Updated | Updated |
|                                                                                       |        |                           |                               |                     |                      |             |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |         |
| US Stock                                                                              |        |                           |                               |                     |                      |             |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |         |
| JPMorgan US Equity R6<br>percentile rank<br># of funds in category                    | JUEMX  | Large Blend               | 24.21<br>37<br>1,468          | 8.72<br>27<br>1,339 | 15.97<br>4<br>1,232  | 13.53<br>4  | ✔             | 17.06             | 0.97           | 10.38      | ✔             | 🇺🇸           | ✖             | 0.44         | ✔             | 3                  | 2-Basic          | Low Risk       |         |         |
| Vanguard 500 Index Admiral<br>percentile rank<br># of funds in category               | VFIAX  | Large Blend Index         | 24.97<br>24<br>1,468          | 8.89<br>23<br>1,339 | 14.48<br>21<br>1,232 | 13.06<br>8  | ✔             | 17.40             | 1.00           | 7.09       | ✔             | 🇺🇸           | ✔             | 0.04         | ✔             | 3                  | 1-Low            | Low Risk       |         |         |
| JPMorgan Large Cap Growth R6<br>percentile rank<br># of funds in category             | JLGMX  | Large Growth              | 34.17<br>24<br>1,117          | 10.63<br>9<br>1,050 | 20.27<br>5<br>980    | 17.87<br>4  | ✔             | 19.88             | 0.95           | 20.43      | ✔             | 🇺🇸           | ✔             | 0.44         | ✔             | 2                  | 2-Basic          | Low Risk       |         |         |
| Vanguard Windsor™ II Admiral™<br>percentile rank<br># of funds in category            | VWNAX  | Large Value               | 14.29<br>53<br>1,190          | 6.32<br>50<br>1,115 | 12.18<br>9<br>1,058  | 10.43<br>12 | ✔             | 16.59             | 0.95           | 21.07      | ✔             | 🇺🇸           | ✖             | 0.26         | ✔             | 3                  | —                | Low Risk       |         |         |
| Vanguard Mid Cap Index Admiral<br>percentile rank<br># of funds in category           | VIMAX  | Mid-Cap Blend             | 15.22<br>36<br>445            | 2.80<br>72<br>407   | 9.85<br>52<br>375    | 9.55<br>31  | ✔             | 19.85             | 0.98           | 1.87       | ✖             | 🇺🇸           | ✔             | 0.05         | ✔             | 4                  | 1-Low            | Medium Risk    |         |         |
| MFS New Discovery R6<br>percentile rank<br># of funds in category                     | MNDKX  | Small Growth              | 6.46<br>93<br>565             | -4.96<br>81<br>547  | 4.83<br>90<br>530    | 9.10<br>49  | ✔             | 21.62             | 0.86           | 11.01      | ✔             | 🇺🇸           | ✔             | 0.90         | ✔             | 4                  | —                | Medium Risk    |         |         |
| Vanguard Small Cap Value Index Admiral<br>percentile rank<br># of funds in category   | VSIAX  | Small Value               | 12.39<br>18<br>498            | 5.74<br>31<br>474   | 9.90<br>35<br>449    | 8.67<br>18  | ✔             | 21.74             | 0.90           | 8.68       | ✔             | 🇺🇸           | ✔             | 0.07         | ✔             | 4                  | 1-Low            | Medium Risk    |         |         |
| Non-US Stock                                                                          |        |                           |                               |                     |                      |             |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |         |
| American Funds New World R6<br>percentile rank<br># of funds in category              | RNWGX  | Diversified Emerging Mkts | 6.88<br>44<br>794             | -0.94<br>39<br>714  | 5.07<br>16<br>639    | 6.57<br>1   | ✔             | 15.98             | 0.79           | 25.56      | ✔             | 🇺🇸           | ✔             | 0.57         | ✔             | 3                  | 1-Low            | Medium Risk    |         |         |
| Hartford Schroders International Stk SDR<br>percentile rank<br># of funds in category | SCIJX  | Foreign Large Blend       | 7.45<br>15<br>771             | 0.78<br>54<br>705   | 7.35<br>5<br>668     | 7.22<br>4   | ✔             | 17.78             | 1.05           | 14.85      | ✔             | 🇺🇸           | ✖             | 0.69         | ✔             | 4                  | —                | Low Risk       |         |         |
| Vanguard Developed Markets Index Admiral<br>percentile rank<br># of funds in category | VTMGX  | Foreign Large Blend Index | 3.04<br>75<br>771             | 0.89<br>50<br>705   | 4.76<br>42<br>668    | 5.47<br>28  | ✔             | 18.00             | 1.09           | 11.86      | ✔             | 🇺🇸           | ✔             | 0.08         | ✔             | 3                  | 1-Low            | Low Risk       |         |         |
| Alternative                                                                           |        |                           |                               |                     |                      |             |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |         |
| Neuberger Berman Real Estate R6<br>percentile rank<br># of funds in category          | NRREX  | Real Estate               | 5.30<br>54<br>229             | -4.83<br>67<br>219  | 3.92<br>33<br>203    | 6.27<br>12  | ✔             | 21.42             | 1.00           | 19.01      | ✔             | —            | ✔             | 0.75         | ✔             | 3                  | —                | Low Risk       |         |         |

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⊖ Fund Removed from Approved List    ⚠ Fund on Watch List

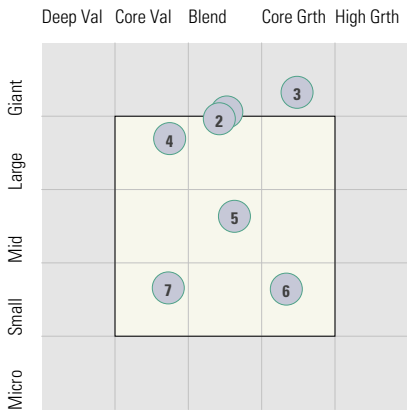
| Name                                   | Ticker | Asset Class              | Trailing Performance and Risk |       |      |       |               |                   |                | Management |               |              | Style         |              | Expense       |                    | ESG Metrics      |                |  |
|----------------------------------------|--------|--------------------------|-------------------------------|-------|------|-------|---------------|-------------------|----------------|------------|---------------|--------------|---------------|--------------|---------------|--------------------|------------------|----------------|--|
|                                        |        |                          | 1 Yr                          | 3 Yr  | 5 Yr | 10 Yr | Pass/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |  |
| Fixed Income                           |        |                          |                               |       |      |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| Vanguard Inflation-Protected Secs Adm  | VAIPX  | Inflation-Protected Bond | 1.86                          | -2.33 | 1.79 | 2.12  | 🟢             | 7.21              | 0.99           | 3.15       | 🟢             | —            | —             | 0.10         | 🟢             | 3                  | —                | —              |  |
| percentile rank                        |        |                          | 55                            | 37    | 45   | 36    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 158                           | 150   | 141  | 104   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | —                | —              |  |
| Baird Aggregate Bond Inst              | BAGIX  | Intermediate-Term Bond   | 1.85                          | -2.07 | 0.11 | 1.76  | 🟢             | 7.95              | 1.01           | 24.27      | 🟢             | 🟡            | —             | 0.30         | 🟢             | 4                  | 1-Low            | —              |  |
| percentile rank                        |        |                          | 34                            | 28    | 27   | 18    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 542                           | 482   | 434  | 294   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | 02-15-2022       | —              |  |
| Loomis Sayles Investment Grade Bond N  | LGBNX  | Multisector Bond         | 2.74                          | -0.65 | 1.92 | 2.58  | 🟢             | 7.44              | 0.94           | 18.27      | 🟢             | —            | —             | 0.44         | 🟢             | 2                  | 1-Low            | —              |  |
| percentile rank                        |        |                          | 31                            | 10    | 3    | 6     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 596                           | 549   | 493  | 354   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | 02-15-2022       | —              |  |
| Lincoln Stable Value Account -LNGPA    |        | Stable Value             | —                             | —     | —    | —     | —             | —                 | —              | 41.70      | 🟢             | —            | —             | —            | —             | —                  | —                | —              |  |
| percentile rank                        |        |                          | —                             | —     | —    | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 11                            | —     | —    | —     |               |                   |                |            |               |              |               |              |               | —                  | —                | —              |  |
| Vanguard Ultra-Short-Term Bond Admiral | VUSFX  | Ultrashort Bond          | 5.66                          | 3.57  | 2.59 | —     | 🟢             | 1.22              | 0.10           | 6.72       | 🟢             | —            | —             | 0.10         | 🟢             | 3                  | —                | —              |  |
| percentile rank                        |        |                          | 50                            | 76    | 56   | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 255                           | 203   | 185  | 112   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | —                | —              |  |
| Balanced                               |        |                          |                               |       |      |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| Vanguard LifeStrategy Cnsvr Gr Inv     | VSCGX  | Target Risk              | 7.54                          | 0.93  | 3.99 | 4.82  | 🟢             | 10.49             | 1.03           | 2.85       | 🔴             | —            | 🟢             | 0.12         | 🟢             | 3                  | 1-Low            | —              |  |
| percentile rank                        |        |                          | 48                            | 50    | 56   | 30    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 458                           | 442   | 406  | 299   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | 07-19-2023       | —              |  |
| Vanguard LifeStrategy Growth Inv       | VASGX  | Target Risk              | 13.18                         | 3.61  | 7.99 | 7.95  | 🟢             | 14.58             | 1.03           | 2.85       | 🔴             | —            | 🟢             | 0.14         | 🟢             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                        |        |                          | 40                            | 43    | 34   | 28    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 306                           | 302   | 274  | 225   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | 07-19-2023       | 12-31-2022     |  |
| Vanguard LifeStrategy Income Inv       | VASIX  | Target Risk              | 4.66                          | -0.46 | 1.87 | 3.15  | 🟢             | 8.64              | 1.03           | 2.85       | 🔴             | —            | 🟢             | 0.11         | 🟢             | 4                  | 1-Low            | —              |  |
| percentile rank                        |        |                          | 71                            | 72    | 76   | 57    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 150                           | 140   | 136  | 105   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | 07-19-2023       | —              |  |
| Vanguard LifeStrategy Mod Gr Inv Shrs  | VSMGX  | Target Risk              | 10.31                         | 2.29  | 6.00 | 6.41  | 🟢             | 12.51             | 1.01           | 2.85       | 🔴             | —            | 🟢             | 0.13         | 🟢             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                        |        |                          | 58                            | 61    | 65   | 53    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |                          | 736                           | 696   | 652  | 495   |               |                   |                |            |               |              |               |              |               | 11-30-2024         | 07-19-2023       | 12-31-2022     |  |

BUCKTAIL MEDICAL CENTER 403B PLAN

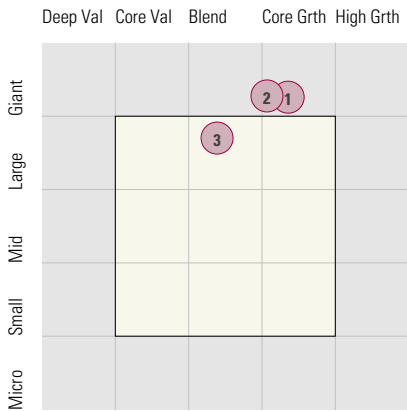
Style Analysis (Data as of 12-31-2024)

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              | JPMorgan US Equity R6                  | Large Blend       | 29.53           | 15.92     | 54.55     | 1.56               | 95.33    | 3.11    | 376.75          |  |  |
| 2              | Vanguard 500 Index Admiral             | Large Blend Index | 28.32           | 18.14     | 53.53     | 0.10               | 99.34    | 0.56    | 362.38          |  |  |
| 3              | JPMorgan Large Cap Growth R6           | Large Growth      | 24.87           | 10.46     | 64.67     | 3.99               | 93.46    | 2.55    | 581.80          |  |  |
| 4              | Vanguard Windsor™ II Admiral™          | Large Value       | 30.76           | 23.89     | 45.36     | 4.35               | 85.05    | 10.60   | 158.41          |  |  |
| 5              | Vanguard Mid Cap Index Admiral         | Mid-Cap Blend     | 33.59           | 22.68     | 43.73     | 0.33               | 98.14    | 1.53    | 34.27           |  |  |
| 6              | MFS New Discovery R6                   | Small Growth      | 18.51           | 29.63     | 51.85     | 3.08               | 86.24    | 10.68   | 6.02            |  |  |
| 7              | Vanguard Small Cap Value Index Admiral | Small Value       | 50.37           | 15.99     | 33.65     | 1.06               | 97.16    | 1.78    | 6.78            |  |  |

| 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 New World R6              | Diversified Emerging Mkts | 40.46           | 19.44     | 40.09     | 31.83               | 45.97        | 22.21          | 54.30             | 45.70 | 80.24           |
| 2                  | Hartford Schroders International Stk SDR | Foreign Large Blend       | 26.53           | 29.81     | 43.66     | 10.51               | 26.07        | 63.42          | 89.05             | 10.95 | 83.50           |
| 3                  | Vanguard Developed Markets Index Admiral | Foreign Large Blend Index | 42.13           | 20.07     | 37.81     | 11.37               | 35.62        | 53.00          | 99.40             | 0.60  | 32.20           |

| 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  | Inflation-Protected Bond | 97.08           | 0.00  | 0.00      | 0.00   | 6.70             |  | 97.69            | 0.00            | 2.31  |
| 2                  | Baird Aggregate Bond Inst              | Intermediate-Term Bond   | 28.07           | 21.85 | 43.22     | 0.00   | 6.08             |  | 99.80            | 0.20            | 0.00  |
| 3                  | Loomis Sayles Investment Grade Bond N  | Multisector Bond         | 42.44           | 0.33  | 51.24     | 0.00   | 6.16             |  | 87.21            | 7.33            | 5.45  |
| 4                  | Lincoln Stable Value Account -LNGPA    | Stable Value             | —               | —     | —         | 0.00   | —                |  | 0.00             | 0.00            | —     |
| 5                  | Vanguard Ultra-Short-Term Bond Admiral | Ultrashort Bond          | 8.30            | 0.79  | 86.30     | 0.00   | 0.90             |  | 98.74            | 0.32            | 0.94  |