

MHSCMC 403(B) 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/ 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	
																Updated	Updated	Updated	
US Stock																			
BNY Mellon S&P 500 Index	PEOPX	Large Blend Index	24.40	8.40	13.95	12.54	Pass	17.40	1.00	4.18	Pass	Pass	Pass	0.50	Pass	3	–	Low Risk	
percentile rank			34	35	37	30													
# of funds in category			1,468	1,339	1,232	914										11-30-2024	–	12-31-2022	
American Funds Washington Mutual R4	RWMEX	Large Value	18.96	8.45	12.02	11.30	Pass	14.41	0.80	27.52	Pass	Pass	Pass	0.61	Pass	2	1-Low	Low Risk	
percentile rank			71	34	70	64											11-30-2024	02-15-2022	12-31-2022
# of funds in category			1,468	1,339	1,232	914													
BNY Mellon MidCap Index Inv	PESPX	Mid-Cap Blend	13.42	4.36	9.80	9.16	Pass	21.04	1.03	4.18	Pass	Pass	Fail	0.50	Pass	3	–	Medium Risk	
percentile rank			57	44	55	51													
# of funds in category			445	407	375	251										11-30-2024	–	12-31-2022	
MFS New Discovery R3	MNDHX	Small Growth	6.06	-5.33	4.44	8.71	Pass	21.60	0.86	11.01	Pass	Pass	Pass	1.28	Pass	4	–	Medium Risk	
percentile rank			95	83	92	59													
# of funds in category			565	547	530	401										11-30-2024	–	12-31-2022	
Macquarie Small Cap Value A	DEVLX	Small Value	10.86	1.98	6.95	7.28	Pass	22.59	0.93	12.51	Pass	Pass	Pass	1.11	Pass	3	–	Medium Risk	
percentile rank			32	85	84	54													
# of funds in category			498	474	449	353										11-30-2024	–	12-31-2022	
Non-US Stock																			
American Funds New World R4	RNWEX	Diversified Emerging Mkts	6.52	-1.29	4.70	6.20	Pass	15.98	0.79	25.56	Pass	Pass	Pass	0.92	Pass	3	1-Low	Medium Risk	
percentile rank			49	41	18	3													
# of funds in category			794	714	639	434										11-30-2024	02-15-2022	12-31-2022	
American Funds Intl Gr and Inc R4	RIGEX	Foreign Large Blend	3.32	0.25	3.57	4.36	Pass	16.34	0.97	16.26	Pass	Pass	Pass	0.88	Pass	3	1-Low	Low Risk	
percentile rank			72	65	75	77													
# of funds in category			771	705	668	442										11-30-2024	02-15-2022	12-31-2022	
BNY Mellon International Stock Index Inv	DIISX	Foreign Large Blend Index	3.26	1.12	4.27	4.81	Pass	17.63	1.06	4.18	Pass	Pass	Pass	0.60	Pass	3	–	Low Risk	
percentile rank			72	43	59	62													
# of funds in category			771	705	668	442										11-30-2024	–	12-31-2022	
Alternative																			
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	4.92	-4.69	2.99	5.06	Pass	21.84	1.03	28.65	Pass	Pass	Pass	0.13	Pass	3	1-Low	Low Risk	
percentile rank			66	62	64	52													
# of funds in category			229	219	203	150										11-30-2024	02-15-2022	12-31-2022	
Fixed Income																			
BlackRock Inflation Protected Bond Inv A	BPRAX	Inflation-Protected Bond	1.61	-2.46	1.76	1.85	Pass	7.41	1.02	6.81	Pass	Pass	Pass	1.09	Fail	3	–	–	
percentile rank			73	54	47	65													
# of funds in category			158	150	141	104										11-30-2024	–	–	
Baird Aggregate Bond Inv	BAGSX	Intermediate-Term Bond	1.63	-2.29	-0.13	1.50	Pass	7.95	1.01	24.27	Pass	Pass	Pass	0.55	Pass	4	1-Low	–	
percentile rank			45	37	41	31													
# of funds in category			542	482	434	294										11-30-2024	02-15-2022	–	

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			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
																Updated	Updated	Updated
PIMCO Income A	PONAX	Multisector Bond	5.00	1.63	2.48	3.85	✓	6.72	0.82	17.77	✓	—	—	1.23	✗	4	—	—
percentile rank			68	36	43	16												
# of funds in category			372	341	297	204										11-30-2024	—	—
Federated Hermes Govt Ultrashort Svc	FEUSX	Ultrashort Bond	5.55	3.60	2.39	1.70	✗	0.94	0.07	27.50	✓	—	—	0.36	✓	—	—	—
percentile rank			58	76	74	78											—	—
# of funds in category			255	203	185	112											—	—

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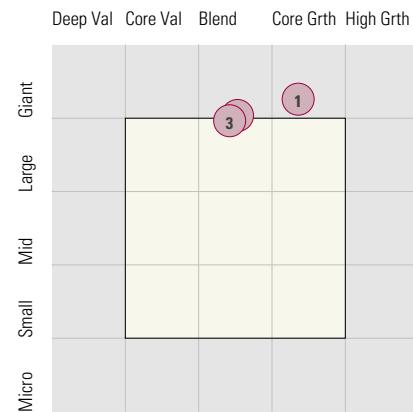
Style Analysis (Data as of 12-31-2024)

Style Analysis

Morningstar Style Box US Stock



Morningstar Style Box Non-US Stock



US Stock Funds

		Category	Super Sectors %			Asset Allocation %			Avg Mkt Cap M\$
			Cyclical	Defensive	Sensitive	Cash	US Stock	Foreign	
1	BNY Mellon S&P 500 Index	Large Blend Index	28.35	18.14	53.50	1.87	97.58	0.55	362.15
2	American Funds Washington Mutual R4	Large Value	30.04	27.95	42.01	3.20	89.56	7.20	204.89
3	BNY Mellon MidCap Index Inv	Mid-Cap Blend	43.44	16.53	40.04	1.03	96.90	2.07	8.82
4	MFS New Discovery R3	Small Growth	18.51	29.63	51.85	3.08	86.24	10.68	6.02
5	Macquarie Small Cap Value A	Small Value	54.95	9.76	35.29	1.11	97.68	1.22	5.59

Non-US Stock Funds

		Category	Super Sectors %			Regional Exposure %			Market Maturity %		
			Cyclical	Defensive	Sensitive	Americas	Greater Asia	Greater Europe	Developed	EM%	Avg Mkt Cap M\$
1	American Funds New World R4	Diversified Emerging Mkts	40.46	19.44	40.09	31.83	45.97	22.21	54.30	45.70	80.24
2	American Funds Intl Gr and Inc R4	Foreign Large Blend	36.43	21.80	41.76	12.63	29.98	57.38	86.75	13.25	57.70
3	BNY Mellon International Stock Index Inv	Foreign Large Blend Index	39.77	23.90	36.33	1.21	34.41	64.39	99.91	0.09	51.96

Fixed Income Funds

		Category	Super Sectors %				Other Stats		Credit Quality %		
			US Govt	Mtg	US Debt	Non Credit	US	Avg Eff Duration	Inv Grade	Below Inv Grade	NR/ NA
1	BlackRock Inflation Protected Bond Inv A	Inflation-Protected Bond	81.73	6.65	3.15	0.00		6.84		96.23	0.88
2	Baird Aggregate Bond Inv	Intermediate-Term Bond	28.07	21.85	43.22	0.00		6.08		99.80	0.20
3	PIMCO Income A	Multisector Bond	28.82	16.21	10.66	0.00		3.28		87.20	12.80
4	Federated Hermes Govt Ultrashort Svc	Ultrashort Bond	7.66	69.83	0.00	0.00		0.69		100.00	0.00