

MURRAY EQUIPMENT INC 401K SALARY

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																			
JPMorgan US Equity R6	JUEMX	Large Blend	24.21	8.72	15.97	13.53	🟢	17.06	0.97	10.38	🟢	🇺🇸	🔴	0.44	🟢	3	2-Basic	Low Risk	
percentile rank			37	27	4	4													
# of funds in category			1,468	1,339	1,232	914										11-30-2024	03-11-2022	12-31-2022	
Fidelity 500 Index	FXAIX	Large Blend Index	25.00	8.93	14.51	13.09	🟢	17.40	1.00	15.93	🟢	🇺🇸	🟢	0.02	🟢	3	1-Low	Low Risk	
percentile rank			23	21	20	8													
# of funds in category			1,468	1,339	1,232	914										11-30-2024	07-19-2023	12-31-2022	
State St Russell Lg Cap Gr® Indx NL Cl C		Large Growth	33.29	10.43	18.92	16.72	🟢	20.62	1.00	25.52	🟢	🇺🇸	🟢	0.04	🟢	3	—	Low Risk	
percentile rank			28	11	12	8													
# of funds in category			1,117	1,050	980	762										11-30-2024	—	12-31-2022	
Vanguard Value Index Adm	VVIAX	Large Value	15.99	7.45	9.93	9.99	🟢	15.75	0.92	30.02	🟢	🇺🇸	🟢	0.05	🟢	3	1-Low	Medium Risk	
percentile rank			34	29	38	18													
# of funds in category			1,190	1,115	1,058	823										11-30-2024	02-15-2022	12-31-2022	
Vanguard Mid-Cap Growth Index Admiral	VMGMX	Mid-Cap Growth	16.41	0.66	10.57	10.40	🟢	22.05	0.97	1.87	🔴	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk	
percentile rank			41	43	31	37													
# of funds in category			512	496	457	370										11-30-2024	02-15-2022	12-31-2022	
Vanguard Selected Value Inv	VASVX	Mid-Cap Value	7.18	7.53	10.95	8.86	🟢	20.81	1.01	19.86	🟢	🇺🇸	🟢	0.43	🟢	4	—	Medium Risk	
percentile rank			83	18	21	28													
# of funds in category			436	405	384	293										11-30-2024	—	12-31-2022	
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	16.49	0.42	7.69	9.09	🟢	23.46	0.95	20.02	🟢	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk	
percentile rank			30	34	56	49													
# of funds in category			565	547	530	401										11-30-2024	02-15-2022	12-31-2022	
DFA US Small Cap Value I	DFSVX	Small Value	9.57	7.93	12.44	8.61	🟢	23.11	0.96	12.85	🟢	🇺🇸	🟢	0.31	🟢	3	—	Medium Risk	
percentile rank			44	12	12	20													
# of funds in category			498	474	449	353										11-30-2024	—	12-31-2022	
Non-US Stock																			
American Funds New World R6	RNWGX	Diversified Emerging Mkts	6.88	-0.94	5.07	6.57	🟢	15.98	0.79	25.56	🟢	🇺🇸	🟢	0.57	🟢	3	1-Low	Medium Risk	
percentile rank			44	39	16	1													
# of funds in category			794	714	639	434										11-30-2024	02-15-2022	12-31-2022	
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	3.68	0.60	3.94	4.72	🟢	16.37	0.98	16.26	🟢	🇺🇸	🟢	0.54	🟢	3	1-Low	Low Risk	
percentile rank			64	58	68	65													
# of funds in category			771	705	668	442										11-30-2024	02-15-2022	12-31-2022	
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	3.04	0.89	4.76	5.47	🟢	18.00	1.09	11.86	🟢	🇺🇸	🟢	0.08	🟢	3	1-Low	Low Risk	
percentile rank			75	50	42	28													
# of funds in category			771	705	668	442										11-30-2024	02-15-2022	12-31-2022	
MFS International Equity R6	MIEIX	Foreign Large Growth	4.14	1.83	6.20	7.13	🟢	17.32	1.03	15.26	🟢	🇺🇸	🟢	0.69	🟢	4	2-Basic	Low Risk	
percentile rank			58	24	10	5													
# of funds in category			771	705	668	442										11-30-2024	02-15-2022	12-31-2022	
Schwab Fundamental Intl Equity Index Fd	SFNNX	Foreign Large Value	2.26	4.13	6.16	5.66	🟢	17.14	0.98	7.69	🟢	🇺🇸	🟢	0.25	🟢	1	—	Medium Risk	
percentile rank			77	38	22	16													
# of funds in category			380	353	326	225										11-30-2024	—	12-31-2022	

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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
Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	16.43	5.17	9.92	—		16.74	1.02	11.86		—		0.10		2	1-Low	Low Risk
percentile rank			31	39	33	—												
# of funds in category			338	322	304	199										11-30-2024	02-15-2022	12-31-2022

Alternative																		
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	4.69	1.82	7.27	1.86		16.37	1.10	6.17		—	—	1.00		3	—	—
percentile rank			75	95	47	55												
# of funds in category			111	103	98	67										11-30-2024	—	—
DFA Real Estate Securities I	DFREX	Real Estate	5.52	-4.16	3.47	5.72		21.30	1.00	12.85		—		0.18		3	—	Low Risk
percentile rank			50	47	46	29												
# of funds in category			229	219	203	150										11-30-2024	—	12-31-2022

Fixed Income																		
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	5.68	1.42	1.72	2.93		5.15	0.56	10.27		—	—	0.75		4	—	—
percentile rank			8	3	4	3												
# of funds in category			119	114	98	60										11-30-2024	—	—
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	6.39	2.66	3.43	4.60		8.37	0.97	2.34		—	—	0.12		2	—	—
percentile rank			82	51	62	35												
# of funds in category			642	596	555	433										11-30-2024	—	—
DFA Inflation-Protected Securities I	DIPSX	Inflation- Protected Bond	2.01	-2.37	1.86	2.29		7.82	1.08	18.30		—	—	0.11		3	—	—
percentile rank			36	45	30	16												
# 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	—
PIMCO Income Instl	PIMIX	Multisector Bond	5.42	2.04	2.89	4.27		6.72	0.82	17.77		—	—	0.83		4	—	—
percentile rank			62	25	29	5												
# of funds in category			372	341	297	204										11-30-2024	—	—
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	5.65	4.08	2.81	2.22		0.84	0.05	11.01		—	—	0.15		3	1-Low	—
percentile rank			52	31	29	35												
# of funds in category			255	203	185	112										11-30-2024	02-15-2022	—

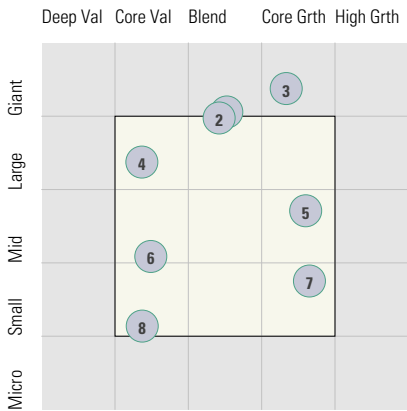
Balanced																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	15.30	5.15	8.47	8.47		11.99	0.96	26.02		—		0.25		3	1-Low	Low Risk
percentile rank			14	11	16	9												
# of funds in category			736	696	652	495										11-30-2024	02-15-2022	12-31-2022

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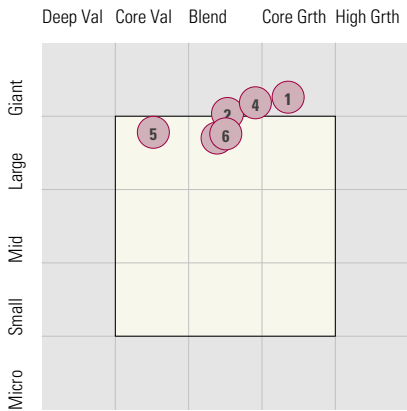
Style Analysis (Data as of 12-31-2024)

Style Analysis

Morningstar Style Box US Stock



Morningstar Style Box Non-US Stock



US Stock Funds			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	Fidelity 500 Index	Large Blend Index	28.44	18.91	52.64	0.02	99.40	0.58	344.73		
3	State St Russell Lg Cap Gr® Indx NL CI C	Large Growth	22.83	10.11	67.04	0.34	99.54	0.11	747.37		
4	Vanguard Value Index Adm	Large Value	33.71	31.35	34.95	0.14	99.03	0.83	128.67		
5	Vanguard Mid-Cap Growth Index Admiral	Mid-Cap Growth	26.77	16.71	56.51	0.27	97.63	2.09	38.81		
6	Vanguard Selected Value Inv	Mid-Cap Value	50.07	16.78	33.14	5.25	83.02	11.72	10.91		
7	Vanguard Small Cap Growth Index Admiral	Small Growth	25.12	20.35	54.53	1.18	97.78	1.04	7.92		
8	DFA US Small Cap Value I	Small Value	53.18	10.20	36.61	0.51	97.75	1.74	3.55		
Non-US Stock Funds			Super Sectors %			Regional Exposure %			Market Maturity %		
		Category	Cyclical	Defensive	Sensitive	Americas	Greater Asia	Greater Europe	Develop- ed	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	American Funds Intl Gr and Inc R6	Foreign Large Blend	36.43	21.80	41.76	12.63	29.98	57.38	86.75	13.25	57.70
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
4	MFS International Equity R6	Foreign Large Growth	36.32	24.70	38.98	5.82	27.25	66.94	96.05	3.95	69.30
5	Schwab Fundamental Intl Equity Index Fd	Foreign Large Value	42.72	18.52	38.74	9.75	39.91	50.34	99.59	0.41	35.20
6	Vanguard Total World Stock Index Admiral	Global Stock	34.15	17.94	47.90	67.90	16.94	15.15	92.32	7.68	115.69
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	PIMCO International Bond (USD-Hdg) Instl	Global Bond	45.51	10.28	4.38	0.00	6.39		96.17	3.83	0.00
2	Vanguard High-Yield Corporate Adm	High Yield Bond	5.80	0.00	88.82	0.00	2.88		11.34	89.26	-0.60
3	DFA Inflation-Protected Securities I	Inflation-Protected Bond	99.89	0.00	0.00	0.00	6.78		100.00	0.00	0.00
4	Baird Aggregate Bond Inst	Intermediate-Term Bond	28.07	21.85	43.22	0.00	6.08		99.80	0.20	0.00
5	PIMCO Income Instl	Multisector Bond	28.82	16.21	10.66	0.00	3.28		87.20	12.80	0.00
6	Baird Ultra Short Bond Institutional	Ultrasort Bond	20.90	0.00	56.81	0.00	0.51		99.80	0.00	0.20