

BIKUR CHOLIM INC 403B PLAN

Screens Summary (Data as of 12-31-2025)

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																		
American Funds Invmt Co of Amer R6 percentile rank	RICGX	Large Blend	20.86 8	24.98 7	15.72 6	14.43 26	🟢	11.57	0.94	33.94	🟢	🇺🇸	🟢	0.27	🟢	2	-	Low Risk
# of funds in category			1,379	1,265	1,169	906										12-31-2025	-	12-31-2022
Fidelity 500 Index percentile rank	FXAIX	Large Blend Index	17.86 24	22.99 22	14.41 19	14.81 12	🟢	11.95	1.00	17.01	🟢	🇺🇸	🟢	0.02	🟢	3	1-Low	Low Risk
# of funds in category			1,379	1,265	1,169	906										12-31-2025	07-19-2023	12-31-2022
JPMorgan Large Cap Growth R6 percentile rank	JLGMX	Large Growth	14.40 65	27.47 57	12.97 36	18.56 7	🟢	15.32	1.00	21.51	🟢	🇺🇸	🟢	0.44	🟢	2	2-Basic	Low Risk
# of funds in category			1,098	1,025	958	770										12-31-2025	04-07-2022	12-31-2022
Vanguard Windsor II Admiral percentile rank	VWNAX	Large Value	18.69 16	17.98 11	12.99 26	12.70 9	🟢	11.30	0.85	22.16	🟢	🇺🇸	🔴	0.23	🟢	3	-	Low Risk
# of funds in category			1,122	1,073	1,011	847										12-31-2025	-	12-31-2022
Vanguard Mid-Cap Growth Index Admiral percentile rank	VMGMX	Mid-Cap Growth	10.69 27	16.63 32	6.35 25	11.63 30	🟢	16.78	0.92	2.50	🔴	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk
# of funds in category			503	485	459	384										12-31-2025	02-15-2022	12-31-2022
Vanguard Mid-Cap Value Index Admiral percentile rank	VMVAX	Mid-Cap Value	12.05 36	11.93 41	10.71 47	9.94 45	🟢	14.60	0.93	2.50	🔴	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk
# of funds in category			424	394	374	301										12-31-2025	02-15-2022	12-31-2022
Vanguard Small Cap Growth Index Admiral percentile rank	VSGAX	Small Growth	8.44 50	15.32 31	3.03 51	10.25 43	🟢	19.25	0.93	21.10	🟢	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk
# of funds in category			543	529	507	396										12-31-2025	02-15-2022	12-31-2022
Vanguard Small Cap Value Index Admiral percentile rank	VSIAX	Small Value	9.09 31	12.45 24	10.56 35	10.15 19	🟢	17.60	0.85	9.77	🟢	🇺🇸	🟢	0.07	🟢	5	1-Low	Medium Risk
# of funds in category			491	468	445	365										12-31-2025	02-15-2022	12-31-2022
Non-US Stock																		
Vanguard Emerging Mkts Stock Idx Adm percentile rank	VEMAX	Diversified Emerging Mkts	24.75 79	14.77 68	4.62 47	8.10 48	🟢	11.93	0.85	17.44	🟢	🇺🇸	🟢	0.13	🟢	2	1-Low	Medium Risk
# of funds in category			756	709	626	462										12-31-2025	02-15-2022	12-31-2022
Nuveen International Res Eq R6 percentile rank	TSOIX	Foreign Large Blend	28.59 68	16.53 59	8.58 41	8.33 43	🟢	12.60	1.02	10.49	🟢	🇺🇸	🟢	0.34	🟢	4	3-Advanced	Low Risk
# of funds in category			756	708	661	506										12-31-2025	03-11-2022	12-31-2022
Vanguard International Growth Adm percentile rank	VWILX	Foreign Large Growth	20.21 49	14.75 40	0.75 81	10.76 1	🟢	16.92	1.21	16.10	🟢	🇺🇸	🟢	0.26	🟢	3	-	Low Risk
# of funds in category			391	368	340	224										12-31-2025	-	12-31-2022
🟡 Vanguard International Value Inv percentile rank	VTRIX	Foreign Large Value	29.98 90	15.11 89	7.79 91	8.11 63	🟢	12.86	1.01	15.69	🟢	🇺🇸	🔴	0.36	🟢	3	-	Medium Risk
# of funds in category			363	342	324	249										12-31-2025	-	12-31-2022
American Funds New Perspective R6 percentile rank	RNPGX	Global Stock	21.62 14	21.22 36	9.37 24	13.05 18	🟢	12.13	1.05	25.18	🟢	—	🟢	0.40	🟢	2	2-Basic	Low Risk
# of funds in category			313	297	271	187										12-31-2025	02-15-2022	12-31-2022

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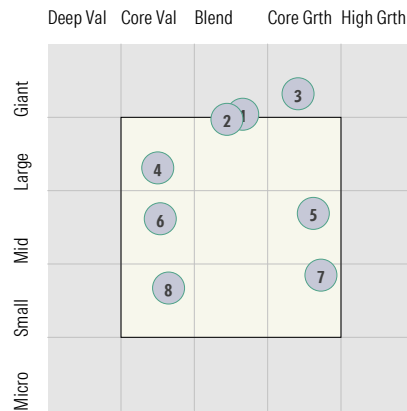
Name	Ticker	Asset Class	Trailing Performance and Risk							Management			Style		Expense		ESG Metrics		
			1 Yr	3 Yr	5 Yr	10 Yr	Pass/ Fail	Std Dev 3 Yr %	Beta 3 Yr %	Tenure	Pass/ Fail	Style Box	Pass/ Fail	Exp Ratio	Pass/ Fail	Sustain. Rating	Commit. Level	Carbon Risk	
																Updated	Updated	Updated	
Alternative																			
PIMCO Commodity Real Ret Strat Instl percentile rank # of funds in category	PCRIX	Commodities Broad Basket	19.27 19 112	4.97 33 102	10.94 53 97	6.79 38 71	🟢	10.40	1.04	7.25	🟢	—	—	0.90	🟢	3	-	-	
Vanguard Real Estate Index Admiral percentile rank # of funds in category	VGSLX	Real Estate	3.19 21 215	6.58 42 204	4.64 57 195	5.14 45 150	🟢	17.25	1.04	29.74	🟢	—	🟢	0.13	🟢	2	1-Low	Low Risk	
Fixed Income																			
PIMCO International Bond (USD-Hdg) Instl percentile rank # of funds in category	PFORX	Global Bond	4.31 66 106	6.47 17 101	1.36 13 96	3.32 15 63	🟢	3.38	0.48	11.36	🟢	—	—	0.57	🟢	3	-	-	
Vanguard High-Yield Corporate Adm percentile rank # of funds in category	VWEAX	High Yield Bond	9.46 11 626	9.17 57 595	4.21 48 560	5.69 43 452	🟢	4.44	0.91	3.43	🟢	—	—	0.12	🟢	2	-	-	
Vanguard Inflation-Protected Secs Adm percentile rank # of funds in category	VAIPX	Inflation- Protected Bond	6.87 42 158	4.15 45 149	1.03 38 142	2.98 37 118	🟢	4.65	1.01	4.23	🟢	—	—	0.10	🟢	3	-	-	
Baird Aggregate Bond Inst percentile rank # of funds in category	BAGIX	Intermediate- Term Bond	7.36 32 512	5.19 25 471	-0.13 27 422	2.43 16 299	🟢	6.13	1.01	25.36	🟢	🟡	—	0.30	🟢	4	1-Low	-	
Loomis Sayles Investment Grade Bond N percentile rank # of funds in category	LGBNX	Multisector Bond	7.12 69 546	5.78 27 510	1.06 13 471	3.82 4 349	🟢	6.01	0.98	19.35	🟢	—	—	0.43	🟢	2	1-Low	-	
Lincoln Stable Value Account -LNGPA percentile rank # of funds in category		Stable Value	- - 37	- - -	- - -	- - -	—	-	-	42.78	🟢	—	—	-	—	-	-	-	
Vanguard Ultra-Short-Term Bond Admiral percentile rank # of funds in category	VUSFX	Ultrashort Bond	5.10 25 247	5.43 44 209	3.18 61 182	2.62 47 111	🟢	0.70	0.10	6.21	🟢	—	—	0.09	🟢	3	-	-	
Balanced																			
American Funds American Balanced R6 percentile rank # of funds in category	RLBGX	Moderate Allocation	18.85 3 492	16.16 11 470	9.92 3 452	10.14 10 373	🟢	8.46	0.98	27.10	🟢	—	🟢	0.25	🟢	3	1-Low	Low Risk	

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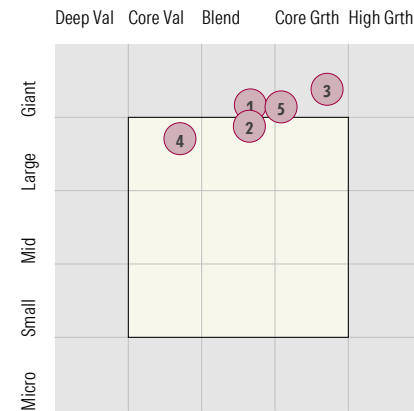
Style Analysis (Data as of 12-31-2025)

Style Analysis

Morningstar Style Box US Stock



Morningstar Style Box Non-US Stock



US Stock Funds

US Stock Funds			Super Sectors %			Asset Allocation %			Avg Mkt Cap M\$
			Cyclical	Defensive	Sensitive	Cash	US Stock	Foreign	
1	American Funds Invmt Co of Amer R6	Large Blend	22.56	20.14	57.29	2.67	87.54	9.18	440.71
2	Fidelity 500 Index	Large Blend Index	26.56	16.99	56.44	0.01	99.48	0.51	465.35
3	JPMorgan Large Cap Growth R6	Large Growth	20.73	12.14	67.13	1.23	93.82	4.96	791.22
4	Vanguard Windsor II Admiral	Large Value	31.13	20.48	48.38	4.62	84.79	10.58	111.94
5	Vanguard Mid-Cap Growth Index Admiral	Mid-Cap Growth	32.45	16.30	51.23	0.21	97.74	2.04	45.02
6	Vanguard Mid-Cap Value Index Admiral	Mid-Cap Value	36.72	26.82	36.46	0.10	98.51	1.25	39.06
7	Vanguard Small Cap Growth Index Admiral	Small Growth	23.27	20.82	55.91	1.63	96.17	2.11	10.33
8	Vanguard Small Cap Value Index Admiral	Small Value	47.49	17.76	34.74	0.63	97.42	1.85	8.11

Non-US Stock Funds

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	Vanguard Emerging Mkts Stock Idx Adm	Diversified Emerging Mkts	44.42	11.01	44.57	7.52	79.10	13.39	27.44	72.56	39.17
2	Nuveen International Res Eq R6	Foreign Large Blend	40.40	21.84	37.76	1.59	34.50	63.91	99.26	0.74	50.75
3	Vanguard International Growth Adm	Foreign Large Growth	32.43	15.91	51.66	19.93	37.49	42.58	81.08	18.92	104.79
4	Vanguard International Value Inv	Foreign Large Value	51.47	16.71	31.84	12.87	39.32	47.81	83.76	16.24	33.51
5	American Funds New Perspective R6	Global Stock	28.91	18.59	52.51	60.61	13.03	26.35	96.59	3.41	231.04

Fixed Income Funds

	Category	Super Sectors %				Other Stats		Credit Quality %		
		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	44.35	9.26	4.31	0.00	7.49	96.20	3.80	0.00
2	Vanguard High-Yield Corporate Adm	High Yield Bond	4.42	0.00	87.08	0.00	2.65	11.09	88.39	0.52
3	Vanguard Inflation-Protected Secs Adm	Inflation-Protected Bond	99.88	0.00	0.00	0.00	6.55	99.77	0.00	0.23
4	Baird Aggregate Bond Inst	Intermediate-Term Bond	29.47	19.85	42.33	0.00	5.98	99.70	0.30	0.00
5	Loomis Sayles Investment Grade Bond N	Multisector Bond	28.83	0.23	62.13	0.00	5.30	86.90	6.37	6.72
6	Lincoln Stable Value Account - LNGPA	Stable Value	-	-	-	0.00	-	0.00	0.00	-
7	Vanguard Ultra-Short-Term Bond Admiral	Ultrashort Bond	12.27	0.94	81.93	0.00	0.98	98.74	0.60	0.66