

MURRAY EQUIPMENT INC 401K SALARY

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 Updated	Commit. Level Updated	Carbon Risk Updated
US Stock																		
JPMorgan US Equity R6	JUEMX	Large Blend	14.74	21.98	13.69	15.00	✔️	12.22	1.01	11.46	✔️	🇺🇸	✖️	0.44	✔️	3	2-Basic	Low Risk
percentile rank			65	43	36	9												
# of funds in category			1,379	1,265	1,169	906									12-31-2025	03-11-2022	12-31-2022	
Fidelity 500 Index	FXAIX	Large Blend Index	17.86	22.99	14.41	14.81	✔️	11.95	1.00	17.01	✔️	🇺🇸	✔️	0.02	✔️	3	1-Low	Low Risk
percentile rank			24	22	19	12												
# of funds in category			1,379	1,265	1,169	906									12-31-2025	07-19-2023	12-31-2022	
State St Russell Lg Cap Gr® Indx NL CI C		Large Growth	18.59	31.14	15.29	18.08	✔️	14.93	1.00	26.60	✔️	🇺🇸	✔️	0.04	✔️	3	-	Low Risk
percentile rank			27	30	11	10												
# of funds in category			1,098	1,025	958	770									12-31-2025	-	12-31-2022	
Vanguard Value Index Adm	WVAX	Large Value	15.26	13.46	12.59	11.66	✔️	11.57	0.91	31.11	✔️	🇺🇸	✔️	0.05	✔️	3	1-Low	Medium Risk
percentile rank			53	55	34	25												
# of funds in category			1,122	1,073	1,011	847									12-31-2025	02-15-2022	12-31-2022	
Vanguard Mid-Cap Growth Index Admiral	VMGMX	Mid-Cap Growth	10.69	16.63	6.35	11.63	✔️	16.78	0.92	2.50	✖️	🇺🇸	✔️	0.07	✔️	4	1-Low	Medium Risk
percentile rank			27	32	25	30												
# of funds in category			503	485	459	384									12-31-2025	02-15-2022	12-31-2022	
Vanguard Selected Value Inv	VASVX	Mid-Cap Value	10.98	14.24	12.01	10.43	✔️	16.89	1.04	20.95	✔️	🇺🇸	✔️	0.42	✔️	4	-	Medium Risk
percentile rank			46	20	28	32												
# of funds in category			424	394	374	301									12-31-2025	-	12-31-2022	
Allspring Small Company Growth R6	WSCRX	Small Growth	8.64	11.57	4.02	9.55	✔️	18.01	0.85	31.24	✔️	🇺🇸	✔️	0.86	✔️	3	-	Low Risk
percentile rank			47	58	40	60												
# of funds in category			543	529	507	396									12-31-2025	-	12-31-2022	
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	8.44	15.32	3.03	10.25	✔️	19.25	0.93	21.10	✔️	🇺🇸	✔️	0.07	✔️	4	1-Low	Medium Risk
percentile rank			50	31	51	43												
# of funds in category			543	529	507	396									12-31-2025	02-15-2022	12-31-2022	
DFA US Small Cap Value I	DFS VX	Small Value	8.38	12.19	13.76	10.38	✔️	19.79	0.96	13.93	✔️	🇺🇸	✔️	0.31	✔️	3	-	Medium Risk
percentile rank			36	28	9	14												
# of funds in category			491	468	445	365									12-31-2025	-	12-31-2022	
Non-US Stock																		
American Funds New World R6	RNWGX	Diversified Emerging Mkts	28.60	16.90	5.62	9.92	✔️	11.42	0.75	26.64	✔️	🇺🇸	✔️	0.57	✔️	4	1-Low	Medium Risk
percentile rank			66	37	34	11												
# of funds in category			756	709	626	462									12-31-2025	02-15-2022	12-31-2022	
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	35.17	17.91	9.11	8.71	✔️	12.70	1.05	12.95	✔️	🇺🇸	✔️	0.05	✔️	2	1-Low	Low Risk
percentile rank			18	29	26	28												
# of funds in category			756	708	661	506									12-31-2025	02-15-2022	12-31-2022	
MFS International Equity R6	MIEIX	Foreign Large Growth	23.23	15.17	8.43	9.39	✔️	12.27	0.97	16.35	✔️	🇺🇸	✔️	0.64	✔️	4	2-Basic	Low Risk
percentile rank			89	77	45	11												
# of funds in category			756	708	661	506									12-31-2025	02-15-2022	12-31-2022	
Schwab Fundamental Intl Equity Index Fd	SFNNX	Foreign Large Value	41.03	20.03	12.75	9.91	✔️	12.01	0.96	8.77	✔️	🇺🇸	✔️	0.25	✔️	1	-	Medium Risk
percentile rank			37	44	33	17												
# of funds in category			363	342	324	249									12-31-2025	-	12-31-2022	

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			1 Yr	3 Yr	5 Yr	10 Yr	Pass/Fail	Std Dev 3 Yr %	Beta 3 Yr %	Tenure Yr %	Pass/Fail	Style Box	Pass/Fail	Exp Ratio	Pass/Fail	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated
Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	22.43	20.21	10.98	-	✓	11.57	1.02	12.95	✓	-	✓	0.09	✓	2	1-Low	Low Risk
percentile rank			26	29	35	-												
# of funds in category			331	307	299	200									12-31-2025	02-15-2022	12-31-2022	

Alternative																		
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	19.27	4.97	10.94	6.79	✓	10.40	1.04	7.25	✓	-	-	0.90	✓	3	-	-
percentile rank			19	33	53	38												
# of funds in category			112	102	97	71									12-31-2025	-	-	
DFA Real Estate Securities I	DFREX	Real Estate	1.51	6.00	4.86	5.54	✓	16.69	1.00	13.93	✓	-	✓	0.18	✓	2	-	Low Risk
percentile rank			58	63	45	35												
# of funds in category			215	204	195	150									12-31-2025	-	12-31-2022	

Fixed Income																		
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	4.31	6.47	1.36	3.32	✓	3.38	0.48	11.36	✓	-	-	0.57	✓	3	-	-
percentile rank			66	17	13	15												
# of funds in category			106	101	96	63									12-31-2025	-	-	
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	9.46	9.17	4.21	5.69	✓	4.44	0.91	3.43	✓	-	-	0.12	✓	2	-	-
percentile rank			11	57	48	43												
# of funds in category			626	595	560	452									07-31-2025	-	-	
DFA Inflation-Protected Securities I	DIPSX	Inflation-Protected Bond	7.03	4.31	1.01	3.11	✓	4.89	1.06	19.38	✓	-	-	0.11	✓	3	-	-
percentile rank			35	29	43	17												
# of funds in category			158	149	142	118									12-31-2025	-	-	
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	7.36	5.19	-0.13	2.43	✓	6.13	1.01	25.36	✓	⊠	-	0.30	✓	4	1-Low	-
percentile rank			32	25	27	16												
# of funds in category			512	471	422	299									12-31-2025	02-15-2022	-	
PIMCO Income Instl	PIMIX	Multisector Bond	11.04	8.57	3.89	5.09	✓	4.82	0.79	18.85	✓	-	-	0.54	✓	4	-	-
percentile rank			4	18	19	10												
# of funds in category			360	340	309	215									12-31-2025	-	-	
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	4.81	5.39	3.44	2.67	✓	0.35	0.04	12.09	✓	-	-	0.15	✓	3	1-Low	-
percentile rank			48	49	28	37												
# of funds in category			247	209	182	111									12-31-2025	02-15-2022	-	

Balanced																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	18.85	16.16	9.92	10.14	✓	8.46	0.98	27.10	✓	-	✓	0.25	✓	3	1-Low	Low Risk
percentile rank			3	11	3	10												
# of funds in category			492	470	452	373									12-31-2025	02-15-2022	12-31-2022	

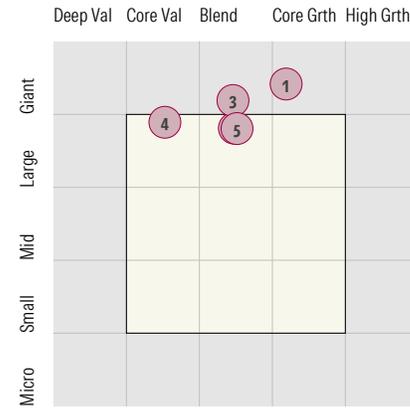
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Style Analysis (Data as of 12-31-2025)

Style Analysis

Morningstar Style Box US Stock

Morningstar Style Box Non-US Stock



US Stock Funds

Rank	Fund Name	Category	Super Sectors %			Asset Allocation %			Avg Mkt Cap M\$
			Cyclical	Defensive	Sensitive	Cash	US Stock	Foreign	
1	JPMorgan US Equity R6	Large Blend	29.62	15.79	54.58	0.68	97.57	1.75	540.83
2	Fidelity 500 Index	Large Blend Index	26.56	16.99	56.44	0.01	99.48	0.51	465.35
3	State St Russell Lg Cap Gr® Indx NL Cl C	Large Growth	20.25	10.87	68.87	0.46	99.26	0.28	847.51
4	Vanguard Value Index Adm	Large Value	34.94	30.46	34.59	0.32	98.45	0.89	142.98
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 Selected Value Inv	Mid-Cap Value	53.91	14.68	31.42	4.12	82.70	13.18	10.77
7	Vanguard Small Cap Growth Index Admiral	Small Growth	23.27	20.82	55.91	1.63	96.17	2.11	10.33
8	Allspring Small Company Growth R6	Small Growth	24.66	22.28	53.06	2.06	94.93	3.02	5.38
9	DFA US Small Cap Value I	Small Value	50.55	13.55	35.91	1.23	96.89	1.87	3.93

Non-US Stock Funds

Rank	Fund Name	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 R6	Diversified Emerging Mkts	39.93	11.22	48.85	28.89	48.96	22.16	58.82	41.18	106.08
2	Vanguard Developed Markets Index Admiral	Foreign Large Blend Index	43.12	18.49	38.37	11.99	35.46	52.55	99.16	0.84	43.13
3	MFS International Equity R6	Foreign Large Growth	40.19	21.68	38.14	3.77	27.99	68.25	96.69	3.31	78.96
4	Schwab Fundamental Intl Equity Index Fd	Foreign Large Value	41.78	18.46	39.75	9.99	39.61	50.40	99.28	0.72	47.20
5	Vanguard Total World Stock Index Admiral	Global Stock	33.96	16.57	49.46	66.16	17.83	16.00	92.10	7.90	147.61

Fixed Income Funds

Rank	Fund Name	Category	Super Sectors %				Other Stats		Credit Quality %		
			US Govt Debt	Mtg Credit	US	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	DFA Inflation-Protected Securities I	Inflation-Protected Bond	99.78	0.00	0.00	0.00	6.74	100.00	0.00	0.00	
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	PIMCO Income Instl	Multisector Bond	30.67	17.06	10.74	0.00	5.10	88.79	11.21	0.00	
6	Baird Ultra Short Bond Institutional	Ultrashort Bond	18.08	0.00	53.72	0.00	0.50	99.80	0.00	0.20	