

JOHNSON MEMORIAL HOSPITAL DEFINED

Screens Summary (Data as of 06-30-2020)

Fund Removed from Approved List

Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management			Style		Expense				
			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	
US Stock																
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	7.47	10.69	10.69	13.95		16.96	1.00	4.18				0.04		
<i>percentile rank</i>			23	18	11	8										
<i># of funds in category</i>			1,383	1,234	1,062	811										
Vanguard Growth Index Admiral	VIGAX	Large Growth	24.77	18.04	14.92	16.77		17.82	1.01	25.52				0.05		
<i>percentile rank</i>			18	35	29	24										
<i># of funds in category</i>			1,346	1,249	1,096	817										
Vanguard Value Index Adm	VVIAX	Large Value	-7.42	3.88	6.44	11.22		17.23	0.95	25.52				0.05		
<i>percentile rank</i>			47	29	19	17										
<i># of funds in category</i>			1,198	1,114	975	710										
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	-0.20	6.45	6.99	12.47		20.04	0.98	22.13				0.05		
<i>percentile rank</i>			12	8	10	5										
<i># of funds in category</i>			410	370	296	216										
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	7.78	11.80	9.26	—		22.50	0.97	15.51				0.07		
<i>percentile rank</i>			36	38	37	—										
<i># of funds in category</i>			627	579	510	381										
Vanguard Small Cap Value Index Admiral	VSIAX	Small Value	-16.48	-2.56	2.00	—		23.30	0.98	4.18				0.07		
<i>percentile rank</i>			34	18	16	—										
<i># of funds in category</i>			436	412	372	258										
Non-US Stock																
Vanguard Emerging Mkts Stock Idx Adm	VEMAX	Diversified Emerging Mkts	-2.92	2.12	2.16	3.14		18.64	0.99	11.84				0.14		
<i>percentile rank</i>			43	36	54	48										
<i># of funds in category</i>			812	701	591	247										
American Funds Europacific Growth R6	REGGX	Foreign Large Blend	3.17	4.76	4.90	7.48		16.90	1.08	19.09				0.46		
<i>percentile rank</i>			62	58	52	51										
<i># of funds in category</i>			477	421	344	249										
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	-4.26	0.88	2.46	6.09		16.20	1.00	7.36				0.07		
<i>percentile rank</i>			43	44	28	20										
<i># of funds in category</i>			763	652	522	369										
Alternative																
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	-6.93	2.23	5.36	9.71		17.83	0.94	24.15		—		0.12		
<i>percentile rank</i>			28	37	31	31										
<i># of funds in category</i>			253	225	199	140										
Fixed Income																
Baird Core Plus Bond Inst	BCOIX	Core Plus Bond	8.83	5.60	4.88	4.86		4.00	1.07	19.76		—	—	0.30		
<i>percentile rank</i>			14	9	7	14										
<i># of funds in category</i>			601	534	455	333										

JOHNSON MEMORIAL HOSPITAL DEFINED

Screens Summary (Data as of 06-30-2020)

⊖ Fund Removed from Approved List
 ! Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk							Management		Style		Expense	
			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
Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation-Protected Bond	8.05 32 212	4.86 31 196	3.66 21 170	3.41 18 115	✔	3.45	0.93	8.87	✔	—	—	0.10	✔
Vanguard Total Bond Market Index Adm <i>percentile rank</i> <i># of funds in category</i>	VBTLX	Intermediate-Term Bond	8.96 20 421	5.34 20 380	4.31 23 331	3.77 47 249	✔	3.32	1.01	7.36	✔	☒	—	0.05	✔
Federated Hermes Govt Ultrashort R6 <i>percentile rank</i> <i># of funds in category</i>	FGULX	Ultrashort Bond	2.08 42 205	1.90 67 164	— — 127	— — 60	✔	0.45	0.07	22.99	✔	—	—	0.24	✔

Target Date															
Vanguard Target Retirement 2015 Inv <i>percentile rank</i> <i># of funds in category</i>	VTXVX	Target Date	5.45 27 123	5.78 26 98	5.47 29 72	7.55 35 48	✔	6.76	0.88	7.36	✔	—	✔	0.13	✔
Vanguard Target Retirement 2020 Inv <i>percentile rank</i> <i># of funds in category</i>	VTWNX	Target Date	5.09 24 224	6.09 18 196	5.96 12 150	8.31 14 95	✔	8.88	1.03	7.36	✔	—	✔	0.13	✔
Vanguard Target Retirement 2025 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTVX	Target Date	4.82 24 230	6.33 22 201	6.29 14 160	8.88 17 94	✔	10.41	1.06	7.36	✔	—	✔	0.13	✔
Vanguard Target Retirement 2030 Inv <i>percentile rank</i> <i># of funds in category</i>	VTHRX	Target Date	4.40 30 239	6.42 26 210	6.47 22 165	9.37 21 103	✔	11.65	1.02	7.36	✔	—	✔	0.14	✔
Vanguard Target Retirement 2035 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTX	Target Date	3.94 26 227	6.45 27 198	6.62 24 157	9.84 19 91	✔	12.87	0.97	7.36	✔	—	✔	0.14	✔
Vanguard Target Retirement 2040 Inv <i>percentile rank</i> <i># of funds in category</i>	VFORX	Target Date	3.46 26 239	6.50 20 210	6.76 22 165	10.08 20 103	✔	14.10	0.96	7.36	✔	—	✔	0.14	✔
Vanguard Target Retirement 2045 Inv <i>percentile rank</i> <i># of funds in category</i>	VTIVX	Target Date	2.97 38 227	6.41 25 198	6.79 23 157	10.10 19 90	✔	15.15	0.98	7.36	✔	—	✔	0.15	✔
Vanguard Target Retirement 2050 Inv <i>percentile rank</i> <i># of funds in category</i>	VFIX	Target Date	3.02 34 239	6.42 24 210	6.79 22 165	10.10 24 83	✔	15.15	0.96	7.36	✔	—	✔	0.15	✔
Vanguard Target Retirement 2055 Inv <i>percentile rank</i> <i># of funds in category</i>	VFFVX	Target Date	2.95 33 227	6.40 26 196	6.77 24 154	— — 36	✔	15.14	0.96	7.36	✔	—	✔	0.15	✔
Vanguard Target Retirement 2060 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTX	Target Date	2.95 31 254	6.39 30 165	6.76 44 63	— — —	✔	15.14	0.95	7.36	✔	—	✔	0.15	✔
Vanguard Target Retirement 2065 Inv <i>percentile rank</i> <i># of funds in category</i>	VLXVX	Target Date	2.84 35 254	— — 165	— — 63	— — —	—	—	—	2.97	✖	—	✔	0.15	✔

JOHNSON MEMORIAL HOSPITAL DEFINED

Screens Summary (Data as of 06-30-2020)

 Fund Removed from Approved List

 Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management			Style		Expense			
			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
Vanguard Target Retirement Income Inv	VTINX	Target Date	5.69	5.39	4.93	5.84		5.55	0.86	7.36		—		0.12	
<i>percentile rank</i>			22	20	20	23									
<i># of funds in category</i>			181	157	134	96									
Balanced															
American Funds Capital Income Bldr R6	RIRGX	World Allocation	-1.28	2.47	3.94	7.24		10.08	0.95	28.52				0.27	
<i>percentile rank</i>			39	45	27	11									
<i># of funds in category</i>			480	409	351	218									