

JOHNSON MEMORIAL HOSPITAL DEFINED

Screens Summary (Data as of 06-30-2021)

⊖ 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	40.83	18.66	17.62	14.81	✔	18.53	1.00	5.18	✔	☒	✔	0.04	✔	
<i>percentile rank</i>			50	26	25	13										
<i># of funds in category</i>			1,395	1,265	1,107	825										
Vanguard Growth Index Admiral	VIGAX	Large Growth	42.77	25.30	23.05	17.46	✔	19.96	1.01	26.52	✔	☒	✔	0.05	✔	
<i>percentile rank</i>			34	22	36	25										
<i># of funds in category</i>			1,244	1,143	1,033	765										
Vanguard Value Index Adm	VVIAX	Large Value	41.29	12.85	13.03	12.27	✔	19.02	0.94	26.52	✔	☒	✔	0.05	✔	
<i>percentile rank</i>			56	37	32	16										
<i># of funds in category</i>			1,215	1,146	1,017	744										
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	46.90	16.49	15.75	13.12	✔	21.61	0.98	23.13	✔	☒	✔	0.05	✔	
<i>percentile rank</i>			67	13	18	10										
<i># of funds in category</i>			389	357	290	202										
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	45.76	18.82	19.38	—	✔	24.22	0.93	16.51	✔	☒	✖	0.07	✔	
<i>percentile rank</i>			79	48	56	—										
<i># of funds in category</i>			614	578	512	388										
Vanguard Small Cap Value Index Admiral	VSIAX	Small Value	65.67	10.85	12.80	—	✔	26.15	0.96	5.18	✔	☒	✖	0.07	✔	
<i>percentile rank</i>			62	27	37	—										
<i># of funds in category</i>			431	407	381	285										
Non-US Stock																
Vanguard Emerging Mkts Stock Idx Adm	VEMAX	Diversified Emerging Mkts	38.72	11.60	11.92	3.91	✔	18.50	0.97	12.84	✔	☒	✔	0.14	✔	
<i>percentile rank</i>			66	39	55	60										
<i># of funds in category</i>			791	701	602	308										
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	35.81	9.14	10.90	6.38	✔	18.56	1.04	8.36	✔	☒	✔	0.07	✔	
<i>percentile rank</i>			31	38	34	23										
<i># of funds in category</i>			760	678	584	390										
American Funds Europacific Growth R6	REGX	Foreign Large Growth	40.10	13.79	14.50	8.33	✔	18.69	1.01	20.09	✔	☒	✔	0.46	✔	
<i>percentile rank</i>			22	42	34	38										
<i># of funds in category</i>			445	384	323	229										
Alternative																
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	34.37	11.96	7.08	9.73	✔	18.49	0.93	25.15	✔	—	✔	0.12	✔	
<i>percentile rank</i>			64	34	48	29										
<i># of funds in category</i>			247	229	200	144										
Fixed Income																
Baird Core Plus Bond Inst	BCOIX	Core Plus Bond	1.78	6.28	4.03	4.34	✔	4.20	1.07	20.76	✔	—	—	0.30	✔	
<i>percentile rank</i>			70	27	34	21										
<i># of funds in category</i>			587	550	478	341										

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Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	6.47	6.41	4.02	3.33	✓	3.74	0.94	9.87	✓	—	—	0.10	✓
<i>percentile rank</i>			<i>51</i>	<i>32</i>	<i>40</i>	<i>19</i>									
<i># of funds in category</i>			<i>206</i>	<i>202</i>	<i>176</i>	<i>123</i>									
Vanguard Total Bond Market Index Adm	VBTLX	Intermediate-Term Bond	-0.42	5.38	2.99	3.36	✓	3.63	1.04	8.36	✓	☒	—	0.05	✓
<i>percentile rank</i>			<i>78</i>	<i>43</i>	<i>53</i>	<i>48</i>									
<i># of funds in category</i>			<i>439</i>	<i>405</i>	<i>350</i>	<i>266</i>									
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	0.35	1.55	1.38	—	✓	0.52	0.05	23.99	✓	—	—	0.24	✓
<i>percentile rank</i>			<i>72</i>	<i>72</i>	<i>74</i>	<i>—</i>									
<i># of funds in category</i>			<i>234</i>	<i>204</i>	<i>163</i>	<i>85</i>									

Target Date

Vanguard Target Retirement 2015 Inv	VTXVX	Target Date	13.56	8.44	7.76	6.96	✓	7.26	0.83	8.36	✓	—	✓	0.12	✓
<i>percentile rank</i>			<i>95</i>	<i>79</i>	<i>79</i>	<i>55</i>									
<i># of funds in category</i>			<i>117</i>	<i>102</i>	<i>76</i>	<i>44</i>									
Vanguard Target Retirement 2020 Inv	VTWNX	Target Date	18.94	10.01	9.39	8.02	✓	9.62	0.99	8.36	✓	—	✓	0.13	✓
<i>percentile rank</i>			<i>56</i>	<i>41</i>	<i>34</i>	<i>24</i>									
<i># of funds in category</i>			<i>168</i>	<i>153</i>	<i>114</i>	<i>66</i>									
Vanguard Target Retirement 2025 Inv	VTTVX	Target Date	22.72	11.10	10.56	8.74	✓	11.34	1.03	8.36	✓	—	✓	0.13	✓
<i>percentile rank</i>			<i>41</i>	<i>32</i>	<i>29</i>	<i>16</i>									
<i># of funds in category</i>			<i>214</i>	<i>196</i>	<i>154</i>	<i>90</i>									
Vanguard Target Retirement 2030 Inv	VTHRX	Target Date	26.02	11.87	11.49	9.33	✓	12.69	1.00	8.36	✓	—	✓	0.14	✓
<i>percentile rank</i>			<i>46</i>	<i>36</i>	<i>36</i>	<i>21</i>									
<i># of funds in category</i>			<i>215</i>	<i>195</i>	<i>155</i>	<i>86</i>									
Vanguard Target Retirement 2035 Inv	VTTX	Target Date	29.32	12.60	12.39	9.89	✓	14.04	0.96	8.36	✓	—	✓	0.14	✓
<i>percentile rank</i>			<i>63</i>	<i>41</i>	<i>41</i>	<i>27</i>									
<i># of funds in category</i>			<i>207</i>	<i>193</i>	<i>151</i>	<i>87</i>									
Vanguard Target Retirement 2040 Inv	VFORX	Target Date	32.67	13.31	13.30	10.39	✓	15.39	0.95	8.36	✓	—	✓	0.14	✓
<i>percentile rank</i>			<i>60</i>	<i>41</i>	<i>35</i>	<i>28</i>									
<i># of funds in category</i>			<i>209</i>	<i>195</i>	<i>155</i>	<i>86</i>									
Vanguard Target Retirement 2045 Inv	VTIVX	Target Date	36.13	14.07	13.93	10.70	✓	16.63	0.97	8.36	✓	—	✓	0.15	✓
<i>percentile rank</i>			<i>49</i>	<i>33</i>	<i>30</i>	<i>20</i>									
<i># of funds in category</i>			<i>207</i>	<i>193</i>	<i>151</i>	<i>86</i>									
Vanguard Target Retirement 2050 Inv	VFIFX	Target Date	36.39	14.15	13.97	10.72	✓	16.65	0.95	8.36	✓	—	✓	0.15	✓
<i>percentile rank</i>			<i>72</i>	<i>38</i>	<i>38</i>	<i>20</i>									
<i># of funds in category</i>			<i>209</i>	<i>195</i>	<i>155</i>	<i>79</i>									
Vanguard Target Retirement 2055 Inv	VFFVX	Target Date	36.40	14.13	13.96	10.72	✓	16.64	0.95	8.36	✓	—	✓	0.15	✓
<i>percentile rank</i>			<i>75</i>	<i>43</i>	<i>44</i>	<i>28</i>									
<i># of funds in category</i>			<i>207</i>	<i>193</i>	<i>148</i>	<i>64</i>									
Vanguard Target Retirement 2060 Inv	VTTX	Target Date	36.39	14.13	13.96	—	✓	16.63	1.46	8.36	✓	—	✓	0.15	✓
<i>percentile rank</i>			<i>76</i>	<i>48</i>	<i>57</i>	<i>—</i>									
<i># of funds in category</i>			<i>201</i>	<i>177</i>	<i>110</i>	<i>—</i>									
Vanguard Target Retirement 2065 Inv	VLXVX	Target Date	36.34	14.06	—	—	✓	16.65	1.46	3.97	✓	—	✓	0.15	✓
<i>percentile rank</i>			<i>83</i>	<i>64</i>	<i>—</i>	<i>—</i>									
<i># of funds in category</i>			<i>74</i>	<i>17</i>	<i>—</i>	<i>—</i>									

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Vanguard Target Retirement Income Inv	VTINX	Target Date	12.02	8.05	6.65	5.81	✔	6.10	0.84	8.36	✔	—	✔	0.12	✔
<i>percentile rank</i>			<i>56</i>	<i>37</i>	<i>44</i>	<i>21</i>									
<i># of funds in category</i>			<i>159</i>	<i>142</i>	<i>118</i>	<i>79</i>									
Balanced															
American Funds Capital Income Bldr R6	RIRGX	World Allocation	23.01	8.79	7.45	7.27	✔	11.60	0.96	29.52	✔	☒	✔	0.27	✔
<i>percentile rank</i>			<i>67</i>	<i>42</i>	<i>64</i>	<i>22</i>									
<i># of funds in category</i>			<i>463</i>	<i>429</i>	<i>375</i>	<i>242</i>									