

# CAMPAIGN LEGAL CENTER INC 401K

## Screens Summary (Data as of 06-30-2024)

⊖ 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 <i>Updated</i>	Commit. Level <i>Updated</i>	Carbon Risk <i>Updated</i>
<b>US Stock</b>																		
Vanguard Dividend Growth Inv	VDIGX	Large Blend	8.88	6.43	10.19	10.74	✓	14.42	0.73	2.00	✖	☒	✓	0.29	✓	4	2-Basic	Low Risk
<i>percentile rank</i>			<i>97</i>	<i>78</i>	<i>89</i>	<i>68</i>												
<i># of funds in category</i>			<i>1,582</i>	<i>1,450</i>	<i>1,331</i>	<i>993</i>									05-31-2024	02-15-2022	12-31-2022	
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	24.51	9.97	15.00	12.82	✓	17.86	1.00	6.59	✓	☒	✓	0.04	✓	3	1-Low	Low Risk
<i>percentile rank</i>			<i>33</i>	<i>22</i>	<i>19</i>	<i>10</i>												
<i># of funds in category</i>			<i>1,582</i>	<i>1,450</i>	<i>1,331</i>	<i>993</i>									05-31-2024	02-15-2022	12-31-2022	
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	11.80	2.21	9.38	9.10	✓	19.41	0.99	1.37	✖	☒	✓	0.05	✓	4	1-Low	Medium Risk
<i>percentile rank</i>			<i>63</i>	<i>70</i>	<i>51</i>	<i>22</i>												
<i># of funds in category</i>			<i>483</i>	<i>448</i>	<i>411</i>	<i>282</i>									05-31-2024	02-15-2022	12-31-2022	
DFA US Small Cap I	DFSTX	Small Blend	11.66	3.23	9.89	7.97	✓	20.34	0.91	12.35	✓	☒	✓	0.27	✓	3	-	Medium Risk
<i>percentile rank</i>			<i>33</i>	<i>24</i>	<i>22</i>	<i>22</i>												
<i># of funds in category</i>			<i>655</i>	<i>628</i>	<i>599</i>	<i>433</i>									05-31-2024	-	12-31-2022	
<b>Non-US Stock</b>																		
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	11.17	1.35	6.44	3.93	✓	16.85	1.00	15.76	✓	☒	✓	0.54	✓	2	1-Low	Low Risk
<i>percentile rank</i>			<i>44</i>	<i>51</i>	<i>39</i>	<i>60</i>												
<i># of funds in category</i>			<i>831</i>	<i>769</i>	<i>718</i>	<i>473</i>									05-31-2024	02-15-2022	12-31-2022	
<b>Fixed Income</b>																		
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	2.69	-1.43	1.96	1.82	✓	7.14	0.99	2.64	✖	—	—	0.10	✓	3	-	-
<i>percentile rank</i>			<i>44</i>	<i>44</i>	<i>43</i>	<i>25</i>												
<i># of funds in category</i>			<i>176</i>	<i>165</i>	<i>159</i>	<i>120</i>									05-31-2024	-	-	
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	3.69	-2.73	0.24	1.75	✓	7.56	1.01	23.77	✓	☒	—	0.30	✓	4	1-Low	-
<i>percentile rank</i>			<i>23</i>	<i>27</i>	<i>24</i>	<i>11</i>												
<i># of funds in category</i>			<i>556</i>	<i>507</i>	<i>455</i>	<i>317</i>									05-31-2024	02-15-2022	-	
Lincoln Stable Value Account -L7NGPA		Stable Value	-	-	-	-	—	-	-	41.19	✓	—	—	-	-	-	-	-
<i>percentile rank</i>			<i>-</i>	<i>-</i>	<i>-</i>	<i>-</i>												
<i># of funds in category</i>			<i>41</i>	<i>-</i>	<i>-</i>	<i>-</i>									-	-	-	
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	5.58	2.78	2.15	-	✓	0.94	0.06	26.99	✓	—	—	0.24	✓	-	-	-
<i>percentile rank</i>			<i>69</i>	<i>57</i>	<i>66</i>	<i>-</i>												
<i># of funds in category</i>			<i>258</i>	<i>212</i>	<i>194</i>	<i>122</i>									-	-	-	
<b>Balanced</b>																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	16.43	5.19	8.82	8.27	✓	12.28	0.98	25.51	✓	—	✓	0.25	✓	2	1-Low	Low Risk
<i>percentile rank</i>			<i>14</i>	<i>12</i>	<i>19</i>	<i>11</i>												
<i># of funds in category</i>			<i>893</i>	<i>843</i>	<i>795</i>	<i>604</i>									05-31-2024	02-15-2022	12-31-2022	