

BIKUR CHOLIM INC 403B PLAN

Screens Summary (Data as of 06-30-2025)

🚫 Fund Removed from Approved List ⚠️ Fund on Watch List

			Trailing Performance and Risk							Management			Style		Expense		ESG Metrics		
Name	Ticker	Asset Class	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	
US Stock																			
American Funds Invmt Co of Amer R6	RICGX	Large Blend	21.19	23.46	17.75	13.21	✔	14.61	0.90	33.35	✔	🗲	✔	0.27	✔	2	—	Low Risk	
percentile rank			4	3	7	23													
# of funds in category			1,431	1,323	1,210	916										04-30-2025	—	12-31-2022	
Fidelity 500 Index	FXAIX	Large Blend Index	15.15	19.70	16.63	13.63	✔	15.80	1.00	16.42	✔	🗲	✔	0.02	✔	3	1-Low	Low Risk	
percentile rank			26	22	19	8													
# of funds in category			1,431	1,323	1,210	916										04-30-2025	07-19-2023	12-31-2022	
JPMorgan Large Cap Growth R6	JLGMX	Large Growth	15.01	25.36	17.35	17.84	✔	17.73	0.93	20.92	✔	🗲	✔	0.44	✔	2	2-Basic	Low Risk	
percentile rank			57	36	19	6													
# of funds in category			1,107	1,057	977	768										05-31-2025	04-07-2022	12-31-2022	
Vanguard Windsor™ II Admiral™	VWNAX	Large Value	10.22	15.45	15.91	10.98	✔	15.36	0.93	21.57	✔	🗲	✖	0.23	✔	3	—	Low Risk	
percentile rank			76	16	20	14													
# of funds in category			1,157	1,105	1,042	837										05-31-2025	—	12-31-2022	
Vanguard Mid-Cap Growth Index Admiral	VMGMX	Mid-Cap Growth	24.78	18.38	12.21	11.16	✔	19.85	0.95	1.91	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
percentile rank			16	21	17	24													
# of funds in category			507	492	459	379										05-31-2025	02-15-2022	12-31-2022	
Vanguard Mid-Cap Value Index Admiral	VMVAX	Mid-Cap Value	11.81	10.89	13.97	8.66	✔	17.82	0.94	1.91	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
percentile rank			23	51	52	38													
# of funds in category			421	392	366	287										05-31-2025	02-15-2022	12-31-2022	
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	11.33	12.77	7.36	8.30	✔	21.82	0.95	20.51	✔	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
percentile rank			24	29	60	49													
# of funds in category			554	537	522	405										05-31-2025	02-15-2022	12-31-2022	
Vanguard Small Cap Value Index Admiral	VSIAX	Small Value	9.12	11.65	15.18	8.39	✔	20.93	0.89	9.18	✔	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
percentile rank			19	22	35	20													
# of funds in category			501	484	453	373										05-31-2025	02-15-2022	12-31-2022	
Non-US Stock																			
Vanguard Emerging Mkts Stock Idx Adm	VEMAX	Diversified Emerging Mkts	15.61	9.37	7.43	4.76	✔	15.75	0.91	16.85	✔	🗲	✔	0.13	✔	2	1-Low	Medium Risk	
percentile rank			29	63	46	49													
# of funds in category			778	720	638	459										05-31-2025	02-15-2022	12-31-2022	
Nuveen International Res Eq R6	TSONX	Foreign Large Blend	17.65	15.55	11.16	—	✔	16.63	1.08	9.90	✔	🗲	✔	0.34	✔	4	3-Advanced	Low Risk	
percentile rank			63	40	39	—													
# of funds in category			764	713	669	469										05-31-2025	03-11-2022	12-31-2022	
Vanguard International Growth Adm	VWILX	Foreign Large Growth	17.94	13.87	7.34	9.60	✔	20.94	1.23	15.52	✔	🗲	✔	0.25	✔	3	—	Low Risk	
percentile rank			32	48	55	6													
# of funds in category			391	368	336	224										05-31-2025	—	12-31-2022	
⚠ Vanguard International Value Inv	VTRIX	Foreign Large Value	13.71	12.51	10.70	5.58	✔	16.02	1.00	15.10	✔	🗲	✖	0.36	✔	3	—	Medium Risk	
percentile rank			97	92	83	77													
# of funds in category			359	344	325	241										05-31-2025	—	12-31-2022	
American Funds New Perspective R6	RNPGX	Global Stock	18.08	18.88	13.84	12.17	✔	15.79	1.05	24.59	✔	—	✔	0.41	✔	2	2-Basic	Low Risk	
percentile rank			23	32	15	15													
# of funds in category			338	323	285	193										05-31-2025	02-15-2022	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	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	7.01 17 109	-0.55 61 100	13.66 45 96	2.62 62 69	✔ 	13.17	1.15	6.67	✔ 	— 	— 	1.00	✔ 	2 05-31-2025	— 	— 	
Vanguard Real Estate Index Admiral percentile rank # of funds in category	VGSLX	Real Estate	10.33 30 225	3.55 51 218	6.53 66 201	5.94 46 153	✔ 	20.28	1.03	29.15	✔ 	— 	✔ 	0.13	✔ 	2 05-31-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
Fixed Income																			
PIMCO International Bond (USD-Hdg) Instl percentile rank # of funds in category	PFORX	Global Bond	6.67 27 107	5.24 10 101	1.82 9 96	3.32 3 60	✔ 	4.53	0.54	10.77	✔ 	— 	— 	0.75	✔ 	3 05-31-2025	— 	— 	
Vanguard High-Yield Corporate Adm percentile rank # of funds in category	VWEAX	High Yield Bond	9.45 39 629	9.12 57 602	5.19 64 560	4.93 28 437	✔ 	6.74	0.98	2.84	✖ 	— 	— 	0.12	✔ 	2 04-30-2025	— 	— 	
Vanguard Inflation-Protected Secs Adm percentile rank # of funds in category	VAIPX	Inflation- Protected Bond	5.68 57 161	2.16 62 152	1.52 49 141	2.58 36 117	✔ 	6.88	1.00	3.64	✔ 	— 	— 	0.10	✔ 	3 05-31-2025	— 	— 	
Baird Aggregate Bond Inst percentile rank # of funds in category	BAGIX	Intermediate- Term Bond	6.21 33 523	3.18 20 480	-0.33 30 423	2.15 17 301	✔ 	7.36	1.01	24.77	✔ 	☒ 	— 	0.30	✔ 	4 05-31-2025	1-Low 02-15-2022	— 	
Loomis Sayles Investment Grade Bond N percentile rank # of funds in category	LGBNX	Multisector Bond	6.12 69 588	4.24 15 556	1.59 9 495	3.20 4 362	✔ 	6.92	0.94	18.76	✔ 	— 	— 	0.43	✔ 	2 05-31-2025	1-Low 02-15-2022	— 	
Lincoln NY Stable Value Account -LYGPA percentile rank # of funds in category		Stable Value	— — 13	— — —	— — —	— — —	— 	— 	— 	28.76	✔ 	— 	— 	— 	— 	— 	— 	— 	
Vanguard Ultra-Short-Term Bond Admiral percentile rank # of funds in category	VUSFX	Ultrashort Bond	5.71 24 257	4.82 64 212	2.82 60 188	2.37 45 114	✔ 	0.90	0.10	5.62	✔ 	— 	— 	0.09	✔ 	3 05-31-2025	— 	— 	
Balanced																			
American Funds American Balanced R6 percentile rank # of funds in category	RLBGX	Moderate Allocation	14.62 4 458	13.27 15 439	10.41 17 412	9.27 10 337	✔ 	11.01	0.98	26.51	✔ 	— 	✔ 	0.25	✔ 	2 05-31-2025	1-Low 02-15-2022	Low Risk 12-31-2022	