

CENTER FOR INITIATIVES IN JEWISH

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																			
DFA US Core Equity 1 I	DFEOX	Large Blend	13.19	17.90	16.45	12.26	✔	16.53	1.03	13.35	✔	🗲	✔	0.15	✔	2	—	Medium Risk	
percentile rank			56	56	27	54													
# of funds in category			1,431	1,323	1,210	916										04-30-2025	—	12-31-2022	
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	15.12	19.66	16.60	13.60	✔	15.80	1.00	7.59	✔	🗲	✔	0.04	✔	3	1-Low	Low Risk	
percentile rank			28	23	21	9													
# of funds in category			1,431	1,323	1,210	916										04-30-2025	02-15-2022	12-31-2022	
Vanguard Growth Index Admiral	VIGAX	Large Growth	17.92	26.07	17.45	16.18	✔	19.74	1.06	30.52	✔	🗲	✔	0.05	✔	3	1-Low	Low Risk	
percentile rank			27	28	18	15													
# of funds in category			1,107	1,057	977	768										05-31-2025	02-15-2022	12-31-2022	
Vanguard Equity-Income Adm	VEIRX	Large Value	15.20	12.77	14.72	10.87	✔	14.36	0.89	4.34	✔	🗲	✔	0.18	✔	2	—	Medium Risk	
percentile rank			17	50	40	16													
# 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	
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	19.25	15.40	11.30	6.79	✔	16.61	1.08	12.36	✔	🗲	✔	0.05	✔	3	1-Low	Low Risk	
percentile rank			36	43	33	27													
# of funds in category			764	713	669	469										05-31-2025	02-15-2022	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	
Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	16.39	17.05	13.62	—	✔	15.15	1.02	12.36	✔	—	✔	0.09	✔	2	1-Low	Low Risk	
percentile rank			23	27	30	—													
# of funds in category			334	315	299	201										05-31-2025	02-15-2022	12-31-2022	

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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	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	1-Low	Low Risk	
															05-31-2025	02-15-2022	12-31-2022		
Fixed Income																			
Lord Abbett Total Return R6 percentile rank # of funds in category	LTRHX	Core Plus Bond	6.70 30 588	3.49 42 556	0.51 29 495	2.15 42 362	🟢	7.12	0.97	24.85	🟢	—	—	0.36	🟢	2	—	—	
															05-31-2025	—	—		
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	1-Low	—	
															05-31-2025	02-15-2022	—		
Lincoln NY Stable Value Account -LYGPA percentile rank # of funds in category		Stable Value	— — 13	— — —	— — —	— — —	—	—	—	28.76	🟢	—	—	—	—	—	—	—	
															—	—	—		
Federated Hermes Govt Ultrashort R6 percentile rank # of funds in category	FGULX	Ultrashort Bond	5.20 61 257	4.69 75 212	2.77 69 188	— — 114	🟢	0.74	0.07	27.99	🟢	—	—	0.24	🟢	—	—	—	
															—	—	—		
Balanced																			
Vanguard LifeStrategy Cnsvr Gr Inv percentile rank # of funds in category	VSCGX	Target Risk	10.51 24 248	8.47 25 —	5.11 57 —	5.38 15 —	🟢	9.47	0.98	3.35	🟢	📊	🟢	0.12	🟢	3	1-Low	—	
															05-31-2025	07-19-2023	—		
Vanguard LifeStrategy Growth Inv percentile rank # of funds in category	VASGX	Target Risk	14.51 29 200	14.09 21 —	10.75 28 —	8.66 15 —	🟢	13.15	0.99	3.35	🟢	📊	🟢	0.14	🟢	3	1-Low	Low Risk	
															05-31-2025	07-19-2023	12-31-2022		
Vanguard LifeStrategy Income Inv percentile rank # of funds in category	VASIX	Target Risk	8.31 36 77	5.63 68 —	2.27 86 —	3.62 54 —	🟢	7.83	0.94	3.35	🟢	📊	🟢	0.11	🟢	4	1-Low	—	
															05-31-2025	07-19-2023	—		

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																			Updated	Updated	Updated
Vanguard LifeStrategy Mod Gr Inv Shrs	VSMGX	Target Risk	12.53	11.28	7.92	7.05	🟢	11.27	0.98	3.35	🟢	📊	🟢	0.13	🟢	3	1-Low	Low Risk			
percentile rank			24	26	44	14															
# of funds in category			467	—	—	—										05-31-2025	07-19-2023	12-31-2022			