

CYPRESS HILLS CEMETERY SECTION

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

🚫 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	Commit. Level	Carbon Risk	
																	Updated	Updated	Updated
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	
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 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	
Allspring Special Mid Cap Value R6	WFPRX	Mid-Cap Value	6.24	10.55	14.10	9.08	✓	16.48	0.87	16.45	✓	📊	✓	0.70	✓	4	—	Medium Risk	
percentile rank			77	56	50	24													
# of funds in category			421	392	366	287										05-31-2025	—	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	
DFA US Small Cap Value I	DFS VX	Small Value	4.04	11.60	18.41	7.96	✓	22.82	0.98	13.35	✓	📊	✓	0.31	✓	3	—	Medium Risk	
percentile rank			59	22	12	25													
# of funds in category			501	484	453	373										05-31-2025	—	12-31-2022	
Non-US Stock																			
American Funds New World R6	RNWGX	Diversified Emerging Mkts	15.53	13.74	8.82	7.83	✓	14.09	0.74	26.05	✓	📊	✓	0.57	✓	3	1-Low	Medium Risk	
percentile rank			29	12	28	2													
# of funds in category			778	720	638	459										05-31-2025	02-15-2022	12-31-2022	
⚠️ MFS Research International R6	MRSKX	Foreign Large Blend	14.28	12.40	8.85	6.33	✓	15.74	1.02	2.50	✖	📊	✓	0.63	✓	3	2-Basic	Low Risk	
percentile rank			85	89	81	51													
# of funds in category			764	713	669	469										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	
Causeway International Value Instl	CIVIX	Foreign Large Value	20.84	20.20	15.92	7.05	✓	16.96	1.05	23.69	✓	📊	✖	0.85	✓	3	—	Low Risk	
percentile rank			62	7	10	23													
# of funds in category			359	344	325	241										05-31-2025	—	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
DFA Global Equity I	DGEIX	Global Stock	14.31	16.29	14.91	10.12	🟢	15.71	1.05	13.35	🟢	—	🟢	0.26	🟢	1	—	Medium Risk
percentile rank			45	43	10	22												
# of funds in category			334	315	299	201										05-31-2025	—	12-31-2022

Alternative																		
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	7.01	-0.55	13.66	2.62	✔️	13.17	1.15	6.67	✔️	—	—	1.00	✔️	2	—	—
percentile rank			17	61	45	62												
# of funds in category			109	100	96	69										05-31-2025	—	—
DFA Real Estate Securities I	DFREX	Real Estate	9.16	3.49	6.75	6.55	✔️	19.65	1.00	13.35	✔️	—	✔️	0.18	✔️	3	—	Low Risk
percentile rank			48	55	58	23												
# of funds in category			225	218	201	153										05-31-2025	—	12-31-2022

Fixed Income																		
American Funds Capital World Bond R6	RCWGX	Global Bond	9.24	3.32	-0.95	1.34	✔️	9.67	0.93	6.34	✔️	—	—	0.48	✔️	2	1-Low	—
percentile rank			41	63	75	44												
# of funds in category			162	162	154	129										05-31-2025	02-15-2022	—
PGIM High Yield R6	PHYQX	High Yield Bond	11.10	9.45	6.13	5.64	✔️	6.70	0.98	17.72	✔️	—	—	0.38	✔️	1	—	—
percentile rank			8	39	30	6												
# of funds in category			629	602	560	437										12-31-2024	—	—
BlackRock Inflation Protected Bond K	BPLBX	Inflation-Protected Bond	5.77	2.46	1.84	2.63	✔️	6.98	1.01	7.30	✔️	—	—	1.04	❌	3	—	—
percentile rank			50	40	22	22												
# of funds in category			161	152	141	117										05-31-2025	—	—
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	6.21	3.18	-0.33	2.15	✔️	7.36	1.01	24.77	✔️	📊	—	0.30	✔️	4	1-Low	—
percentile rank			33	20	30	17												
# of funds in category			523	480	423	301										05-31-2025	02-15-2022	—
PIMCO Income Instl	PIMIX	Multisector Bond	9.31	7.29	4.37	4.53	✔️	5.95	0.81	18.27	✔️	—	—	0.83	✔️	4	—	—
percentile rank			16	29	24	7												
# of funds in category			377	356	310	213										05-31-2025	—	—
Lincoln NY Stable Value Account -LYGPA		Stable Value	—	—	—	—	—	—	—	28.76	✔️	—	—	—	—	—	—	—
percentile rank			—	—	—	—												
# of funds in category			13	—	—	—										—	—	—
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	5.30	5.06	3.05	2.42	✔️	0.51	0.04	11.50	✔️	—	—	0.15	✔️	3	1-Low	—
percentile rank			55	42	34	38												
# of funds in category			257	212	188	114										05-31-2025	02-15-2022	—

Target Date																		
BlackRock LifePath® Index 2030 K	LINKX	Target Date	11.24	10.17	7.67	7.01	✔️	11.66	0.96	5.08	✔️	—	✔️	0.09	✔️	4	1-Low	Low Risk
percentile rank			42	69	76	59												
# of funds in category			239	223	190	130										05-31-2025	04-07-2022	12-31-2022
BlackRock LifePath® Index 2035 K	LIJXK	Target Date	12.46	11.84	9.31	7.93	✔️	12.75	0.98	5.08	✔️	—	✔️	0.09	✔️	4	1-Low	Low Risk
percentile rank			34	68	65	44												
# of funds in category			235	214	183	130										05-31-2025	04-07-2022	12-31-2022

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																Updated	Updated	Updated
BlackRock LifePath® Index 2040 K percentile rank # of funds in category	LIKX	Target Date	13.59 30 235	13.46 58 218	10.85 43 185	8.76 34 130	🟢	13.77	1.00	5.08	🟢	—	🟢	0.09	🟢	4	1-Low	Low Risk
BlackRock LifePath® Index 2045 K percentile rank # of funds in category	LIHX	Target Date	14.52 27 229	14.94 36 214	12.16 23 183	9.45 17 130	🟢	14.63	1.02	5.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2050 K percentile rank # of funds in category	LIPX	Target Date	15.54 9 233	16.03 17 216	13.02 8 185	9.87 5 130	🟢	15.11	1.03	5.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2055 K percentile rank # of funds in category	LIVX	Target Date	16.13 4 228	16.50 11 213	13.29 7 182	10.01 4 130	🟢	15.24	1.03	5.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2060 K percentile rank # of funds in category	LIZX	Target Date	16.13 4 227	16.51 11 212	13.28 8 176	— — 73	🟢	15.28	1.30	5.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2065 K percentile rank # of funds in category	LIWKX	Target Date	16.15 5 292	16.54 13 180	13.29 5 86	— — —	🟢	15.29	1.30	5.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index Retire K percentile rank # of funds in category	LIRX	Target Date	9.92 15 179	7.88 26 166	4.96 25 138	5.24 8 99	🟢	9.88	1.18	5.08	🟢	—	🟢	0.09	🟢	5	1-Low	—

Balanced

American Funds American Balanced R6	RLBGX	Moderate Allocation	14.62	13.27	10.41	9.27		11.01	0.98	26.51		—		0.25		2	1-Low	Low Risk
percentile rank			4	15	17	10												
# of funds in category			458	439	412	337										05-31-2025	02-15-2022	12-31-2022