

HYBERG WHITE AND MANN P C

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/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |         |
|                                          |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                          |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    | Updated          | Updated        | Updated |
| US Stock                                 |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| T. Rowe Price Dividend Growth            | PRDGX  | Large Blend               | 11.31                         | 13.82 | 13.69 | 12.06 | ✓             | 14.01             | 0.83           | 25.27      | ✓             | 🇺🇸           | ✓             | 0.64         | ✓             | 3                  | —                | Low Risk       |         |
| percentile rank                          |        |                           | 76                            | 85    | 79    | 57    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # 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       |                |         |
| Fidelity Contrafund                      | FCNTX  | Large Growth              | 21.01                         | 28.39 | 17.99 | 16.00 | ✓             | 16.41             | 0.84           | 34.81      | ✓             | 🇺🇸           | ✓             | 0.63         | ✓             | 1                  | 1-Low            | Low Risk       |         |
| percentile rank                          |        |                           | 16                            | 11    | 12    | 18    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 1,107                         | 1,057 | 977   | 768   |               |                   |                |            |               |              |               |              | 05-31-2025    | 02-15-2022         | 12-31-2022       |                |         |
| American Funds Washington Mutual R6      | RWMGX  | Large Value               | 16.90                         | 17.30 | 16.44 | 12.76 | ✓             | 13.23             | 0.80           | 28.02      | ✓             | 🇺🇸           | ✓             | 0.26         | ✓             | 2                  | 1-Low            | Low Risk       |         |
| percentile rank                          |        |                           | 9                             | 63    | 27    | 39    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 1,431                         | 1,323 | 1,210 | 916   |               |                   |                |            |               |              |               |              | 04-30-2025    | 02-15-2022         | 12-31-2022       |                |         |
| Neuberger Berman Mid Cap Growth Inst     | NBMLX  | Mid-Cap Growth            | 22.19                         | 18.77 | 11.41 | 10.83 | ✓             | 20.91             | 0.99           | 5.46       | ✓             | 🇺🇸           | ✓             | 0.69         | ✓             | 3                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 20                            | 19    | 25    | 29    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 507                           | 492   | 459   | 379   |               |                   |                |            |               |              |               |              | 05-31-2025    | —                  | 12-31-2022       |                |         |
| American Century Mid Cap Value I         | AVUAX  | Mid-Cap Value             | 10.72                         | 8.44  | 11.97 | 8.37  | ✓             | 15.62             | 0.81           | 21.26      | ✓             | 🇺🇸           | ✓             | 0.78         | ✓             | 3                  | 1-Low            | Medium Risk    |         |
| percentile rank                          |        |                           | 35                            | 77    | 79    | 44    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 421                           | 392   | 366   | 287   |               |                   |                |            |               |              |               |              | 05-31-2025    | 02-15-2022         | 12-31-2022       |                |         |
| MFS New Discovery R4                     | MNDJX  | Small Growth              | 7.62                          | 9.08  | 4.51  | 8.43  | ✓             | 19.66             | 0.84           | 11.50      | ✓             | 🇺🇸           | ✓             | 1.03         | ✓             | 4                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 44                            | 69    | 85    | 44    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 554                           | 537   | 522   | 405   |               |                   |                |            |               |              |               |              | 05-31-2025    | —                  | 12-31-2022       |                |         |
| Macquarie Small Cap Value Instl          | DEVIX  | Small Value               | 7.36                          | 8.70  | 13.55 | 7.31  | ✓             | 21.73             | 0.93           | 13.01      | ✓             | 🇺🇸           | ✓             | 0.85         | ✓             | 3                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 32                            | 56    | 56    | 40    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 501                           | 484   | 453   | 373   |               |                   |                |            |               |              |               |              | 05-31-2025    | —                  | 12-31-2022       |                |         |
| Non-US Stock                             |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| American Funds New World R6              | RNWXG  | 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       |                |         |
| American Funds Intl Gr and Inc R6        | RIGGX  | Foreign Large Blend       | 18.79                         | 15.13 | 11.36 | 6.53  | ✓             | 15.10             | 0.98           | 16.76      | ✓             | 🇺🇸           | ✓             | 0.54         | ✓             | 3                  | 1-Low            | Low Risk       |         |
| percentile rank                          |        |                           | 39                            | 48    | 31    | 40    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # 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       |                |         |
| Invesco Oppenheimer International Gr Y   | OIGYX  | Foreign Large Growth      | 8.07                          | 12.07 | 6.58  | 5.21  | ✓             | 19.24             | 1.19           | 13.26      | ✓             | 🇺🇸           | ✓             | 0.86         | ✓             | 4                  | —                | Low Risk       |         |
| percentile rank                          |        |                           | 87                            | 67    | 66    | 81    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # 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       |                |         |

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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/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |
|                                   |        |              |                               |       |       |       |               |                   |                |        |               |              |               |              |               | Updated            | Updated          | Updated        |
| 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     |

| Alternative                          |       |                             |       |       |       |      |   |       |      |       |   |   |   |      |   |            |            |            |
|--------------------------------------|-------|-----------------------------|-------|-------|-------|------|---|-------|------|-------|---|---|---|------|---|------------|------------|------------|
| PIMCO Commodity Real Return Strat I2 | PCRPX | Commodities<br>Broad Basket | 7.00  | -0.65 | 13.56 | 2.54 | ✓ | 13.13 | 1.15 | 6.67  | ✓ | — | — | 1.10 | ✓ | 2          | —          | —          |
| percentile rank                      |       |                             | 18    | 62    | 45    | 65   |   |       |      |       |   |   |   |      |   |            |            |            |
| # of funds in category               |       |                             | 109   | 100   | 96    | 69   |   |       |      |       |   |   |   |      |   | 05-31-2025 | —          | —          |
| Vanguard Real Estate Index Admiral   | VGSLX | Real Estate                 | 10.33 | 3.55  | 6.53  | 5.94 | ✓ | 20.28 | 1.03 | 29.15 | ✓ | — | ✓ | 0.13 | ✓ | 2          | 1-Low      | Low Risk   |
| percentile rank                      |       |                             | 30    | 51    | 66    | 46   |   |       |      |       |   |   |   |      |   |            |            |            |
| # of funds in category               |       |                             | 225   | 218   | 201   | 153  |   |       |      |       |   |   |   |      |   | 05-31-2025 | 02-15-2022 | 12-31-2022 |

| Fixed Income                             |       |                              |      |      |       |      |   |      |      |       |   |   |   |      |   |            |            |   |
|------------------------------------------|-------|------------------------------|------|------|-------|------|---|------|------|-------|---|---|---|------|---|------------|------------|---|
| PIMCO International Bond (USD-Hdg) I-2   | PFBPX | Global Bond                  | 6.56 | 5.14 | 1.72  | 3.22 | ✓ | 4.53 | 0.54 | 10.77 | ✓ | — | — | 0.85 | ✓ | 3          | —          | — |
| percentile rank                          |       |                              | 29   | 12   | 10    | 7    |   |      |      |       |   |   |   |      |   |            |            |   |
| # of funds in category                   |       |                              | 107  | 101  | 96    | 60   |   |      |      |       |   |   |   |      |   | 05-31-2025 | —          | — |
| Eaton Vance Income Fund of Boston I      | EIBIX | High Yield Bond              | 8.84 | 9.38 | 6.18  | 4.97 | ✓ | 6.36 | 0.93 | 10.66 | ✓ | — | — | 0.73 | ✓ | —          | —          | — |
| percentile rank                          |       |                              | 61   | 43   | 28    | 24   |   |      |      |       |   |   |   |      |   |            |            |   |
| # of funds in category                   |       |                              | 629  | 602  | 560   | 437  |   |      |      |       |   |   |   |      |   | —          | —          | — |
| BlackRock Inflation Protected Bond Instl | BPRIX | Inflation-<br>Protected Bond | 5.58 | 2.38 | 1.76  | 2.56 | ✓ | 7.01 | 1.02 | 7.30  | ✓ | — | — | 1.09 | ✖ | 3          | —          | — |
| percentile rank                          |       |                              | 67   | 41   | 24    | 37   |   |      |      |       |   |   |   |      |   |            |            |   |
| # of funds in category                   |       |                              | 161  | 152  | 141   | 117  |   |      |      |       |   |   |   |      |   | 05-31-2025 | —          | — |
| Baird Aggregate Bond Inst                | BAGIX | Intermediate-<br>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 I2                          | PONPX | Multisector<br>Bond          | 9.20 | 7.18 | 4.27  | 4.43 | ✓ | 5.95 | 0.81 | 18.27 | ✓ | — | — | 0.93 | ✓ | 4          | —          | — |
| percentile rank                          |       |                              | 18   | 31   | 26    | 7    |   |      |      |       |   |   |   |      |   |            |            |   |
| # of funds in category                   |       |                              | 377  | 356  | 310   | 213  |   |      |      |       |   |   |   |      |   | 05-31-2025 | —          | — |
| Federated Hermes Govt Ultrashort IS      | FGUSX | Ultrashort Bond              | 5.18 | 4.67 | 2.75  | 2.00 | ✖ | 0.75 | 0.07 | 27.99 | ✓ | — | — | 0.26 | ✓ | —          | —          | — |
| percentile rank                          |       |                              | 62   | 76   | 71    | 75   |   |      |      |       |   |   |   |      |   |            |            |   |
| # of funds in category                   |       |                              | 257  | 212  | 188   | 114  |   |      |      |       |   |   |   |      |   | —          | —          | — |

| Target Date                   |       |             |      |      |      |      |   |      |      |      |   |   |   |      |   |            |            |   |
|-------------------------------|-------|-------------|------|------|------|------|---|------|------|------|---|---|---|------|---|------------|------------|---|
| T. Rowe Price Retirement 2005 | TRRFX | Target Date | 8.95 | 8.39 | 5.85 | 5.49 | ✓ | 8.52 | 0.96 | 9.92 | ✓ | — | ✓ | 0.49 | ✓ | 3          | 1-Low      | — |
| percentile rank               |       |             | 44   | 18   | 14   | 16   |   |      |      |      |   |   |   |      |   |            |            |   |
| # of funds in category        |       |             | 95   | 85   | 79   | 47   |   |      |      |      |   |   |   |      |   | 05-31-2025 | 02-15-2022 | — |
| T. Rowe Price Retirement 2010 | TRRAX | Target Date | 9.20 | 8.81 | 6.32 | 5.85 | ✓ | 8.90 | 1.00 | 9.92 | ✓ | — | ✓ | 0.49 | ✓ | 3          | 1-Low      | — |
| percentile rank               |       |             | 26   | 9    | 5    | 4    |   |      |      |      |   |   |   |      |   |            |            |   |
| # of funds in category        |       |             | 95   | 85   | 79   | 47   |   |      |      |      |   |   |   |      |   | 05-31-2025 | 02-15-2022 | — |
| T. Rowe Price Retirement 2015 | TRRGX | Target Date | 9.33 | 9.21 | 6.84 | 6.27 | ✓ | 9.17 | 0.93 | 9.92 | ✓ | — | ✓ | 0.50 | ✓ | 3          | 1-Low      | — |
| percentile rank               |       |             | 49   | 5    | 4    | 3    |   |      |      |      |   |   |   |      |   |            |            |   |
| # of funds in category        |       |             | 102  | 92   | 88   | 55   |   |      |      |      |   |   |   |      |   | 05-31-2025 | 02-15-2022 | — |

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|----------------------------------------------------------------------------|--------|-------------|-------------------------------|--------------------|--------------------|-------------------|---------------|-------------------|----------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------------|------------------|------------------|
|                                                                            |        |             | 1 Yr                          | 3 Yr               | 5 Yr               | 10 Yr             | Pass/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure       | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk   |
|                                                                            |        |             |                               |                    |                    |                   |               |                   |                |              |               |              |               |              |               | Updated            | Updated          | Updated          |
| T. Rowe Price Retirement 2020<br>percentile rank<br># of funds in category | TRRBX  | Target Date | 9.61<br>55<br>131             | 9.56<br>8<br>117   | 7.36<br>6<br>106   | 6.74<br>1<br>62   | ✔<br><br>     | 9.54<br><br>      | 0.89<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.52<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | —<br><br>        |
| T. Rowe Price Retirement 2025<br>percentile rank<br># of funds in category | TRRHX  | Target Date | 9.87<br>61<br>193             | 10.27<br>15<br>178 | 8.12<br>1<br>151   | 7.30<br>2<br>99   | ✔<br><br>     | 10.27<br><br>     | 0.90<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.54<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2030<br>percentile rank<br># of funds in category | TRRCX  | Target Date | 10.52<br>65<br>239            | 11.46<br>19<br>223 | 9.11<br>2<br>190   | 7.93<br>6<br>130  | ✔<br><br>     | 11.44<br><br>     | 0.93<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.56<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2035<br>percentile rank<br># of funds in category | TRRJX  | Target Date | 11.30<br>73<br>235            | 12.84<br>24<br>214 | 10.16<br>20<br>183 | 8.54<br>11<br>130 | ✔<br><br>     | 12.64<br><br>     | 0.97<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.59<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2040<br>percentile rank<br># of funds in category | TRRDY  | Target Date | 11.95<br>77<br>235            | 14.00<br>33<br>218 | 11.08<br>34<br>185 | 9.06<br>18<br>130 | ✔<br><br>     | 13.51<br><br>     | 0.98<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.60<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2045<br>percentile rank<br># of funds in category | TRRKX  | Target Date | 12.50<br>83<br>229            | 14.81<br>46<br>214 | 11.79<br>45<br>183 | 9.43<br>19<br>130 | ✔<br><br>     | 14.01<br><br>     | 0.97<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.61<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2050<br>percentile rank<br># of funds in category | TRRMX  | Target Date | 12.68<br>84<br>233            | 15.08<br>55<br>216 | 11.93<br>54<br>185 | 9.50<br>19<br>130 | ✔<br><br>     | 14.17<br><br>     | 0.96<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.63<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2055<br>percentile rank<br># of funds in category | TRRNK  | Target Date | 12.73<br>86<br>228            | 15.09<br>65<br>213 | 11.94<br>59<br>182 | 9.48<br>22<br>130 | ✔<br><br>     | 14.27<br><br>     | 0.96<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.64<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2060<br>percentile rank<br># of funds in category | TRRLX  | Target Date | 12.70<br>87<br>227            | 15.10<br>64<br>212 | 11.93<br>66<br>176 | 9.48<br>34<br>73  | ✔<br><br>     | 14.27<br><br>     | 1.21<br><br>   | 9.92<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.64<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |
| T. Rowe Price Retirement 2065<br>percentile rank<br># of funds in category | TRSJK  | Target Date | 12.70<br>90<br>292            | 15.06<br>73<br>180 | —<br>—<br>86       | —<br>—<br>—       | ✔<br><br>     | 14.23<br><br>     | 1.21<br><br>   | 4.72<br><br> | ✔<br><br>     | —<br><br>    | ✔<br><br>     | 0.64<br><br> | ✔<br><br>     | 3<br><br>          | 1-Low<br><br>    | Low Risk<br><br> |

| Balanced                          |       |                   |       |       |      |      |  |       |      |      |  |  |  |      |  |            |   |            |
|-----------------------------------|-------|-------------------|-------|-------|------|------|--|-------|------|------|--|--|--|------|--|------------|---|------------|
| BlackRock Global Allocation Instl | MALOX | Global Allocation | 13.99 | 11.09 | 8.10 | 6.28 |  | 11.31 | 0.96 | 8.50 |  |  |  | 0.85 |  | 3          | — | Low Risk   |
| percentile rank                   |       |                   | 10    | 28    | 36   | 37   |  |       |      |      |  |  |  |      |  |            |   |            |
| # of funds in category            |       |                   | 467   | —     | —    | —    |  |       |      |      |  |  |  |      |  | 05-31-2025 | — | 09-30-2022 |