

JORDAN VALLEY COMMUNITY HEALTH

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

Fund Removed from Approved ListFund 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                                                    |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| Vanguard 500 Index Admiral<br>percentile rank               | 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       |         |
| # of funds in category                                      |        |                           | 28                            | 23    | 21    | 9     |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 1,431                         | 1,323 | 1,210 | 916   |               |                   |                |            |               |              |               |              |               | 04-30-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Growth Index Admiral<br>percentile rank            | VIGAX  | Large Growth              | 17.92                         | 26.07 | 17.45 | 16.18 | ✔             | 19.74             | 1.06           | 30.52      | ✔             | 🇺🇸           | ✔             | 0.05         | ✔             | 3                  | 1-Low            | Low Risk       |         |
| # of funds in category                                      |        |                           | 27                            | 28    | 18    | 15    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 1,107                         | 1,057 | 977   | 768   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Value Index Adm<br>percentile rank                 | VVIAX  | Large Value               | 12.63                         | 13.08 | 14.92 | 10.60 | ✔             | 14.95             | 0.93           | 30.52      | ✔             | 🇺🇸           | ✔             | 0.05         | ✔             | 3                  | 1-Low            | Medium Risk    |         |
| # of funds in category                                      |        |                           | 50                            | 45    | 36    | 18    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 1,157                         | 1,105 | 1,042 | 837   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Mid-Cap Growth Index Admiral<br>percentile rank    | 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    |         |
| # of funds in category                                      |        |                           | 16                            | 21    | 17    | 24    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 507                           | 492   | 459   | 379   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Small Cap Growth Index Admiral<br>percentile rank  | VSGAX  | Small Growth              | 11.33                         | 12.77 | 7.36  | 8.30  | ✔             | 21.82             | 0.95           | 20.51      | ✔             | 🇺🇸           | ✔             | 0.07         | ✔             | 4                  | 1-Low            | Medium Risk    |         |
| # of funds in category                                      |        |                           | 24                            | 29    | 60    | 49    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 554                           | 537   | 522   | 405   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Small Cap Value Index Admiral<br>percentile rank   | VSIAX  | Small Value               | 9.12                          | 11.65 | 15.18 | 8.39  | ✔             | 20.93             | 0.89           | 9.18       | ✔             | 🇺🇸           | ✔             | 0.07         | ✔             | 4                  | 1-Low            | Medium Risk    |         |
| # of funds in category                                      |        |                           | 19                            | 22    | 35    | 20    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 501                           | 484   | 453   | 373   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Non-US Stock                                                |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| Macquarie Emerging Markets Instl<br>percentile rank         | DEMIX  | Diversified Emerging Mkts | 16.67                         | 15.69 | 8.89  | 7.85  | ✔             | 22.16             | 1.17           | 18.78      | ✔             | 🇺🇸           | ✔             | 1.17         | ✔             | 3                  | —                | Medium Risk    |         |
| # of funds in category                                      |        |                           | 20                            | 6     | 27    | 2     |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 778                           | 720   | 638   | 459   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |         |
| American Funds Intl Gr and Inc R6<br>percentile rank        | 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       |         |
| # of funds in category                                      |        |                           | 39                            | 48    | 31    | 40    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 764                           | 713   | 669   | 469   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Developed Markets Index Admiral<br>percentile rank | 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       |         |
| # of funds in category                                      |        |                           | 36                            | 43    | 33    | 27    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 764                           | 713   | 669   | 469   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Alternative                                                 |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| Vanguard Real Estate Index Admiral<br>percentile rank       | VGSLX  | Real Estate               | 10.33                         | 3.55  | 6.53  | 5.94  | ✔             | 20.28             | 1.03           | 29.15      | ✔             | —            | ✔             | 0.13         | ✔             | 2                  | 1-Low            | Low Risk       |         |
| # of funds in category                                      |        |                           | 30                            | 51    | 66    | 46    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 225                           | 218   | 201   | 153   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | 12-31-2022     |         |
| Fixed Income                                                |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| American Century Inflation Adjs Bond R5<br>percentile rank  | AIANX  | Inflation-Protected Bond  | 5.85                          | 2.08  | 1.63  | 2.52  | ✔             | 7.02              | 1.02           | 23.60      | ✔             | —            | —             | 0.34         | ✔             | 3                  | —                | —              |         |
| # of funds in category                                      |        |                           | 39                            | 71    | 30    | 45    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                                             |        |                           | 161                           | 152   | 141   | 117   |               |                   |                |            |               |              |               |              |               | 05-31-2024         | —                | —              |         |

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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        |
| 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       | —              |
| Loomis Sayles Bond N                | LSBNX  | Multisector Bond       | 10.89                         | 6.69 | 3.53  | 3.07  | ✓             | 7.23              | 0.98           | 18.42      | ✓             | —            | —             | 0.59         | ✓             | 1                  | 1-Low            | —              |
| percentile rank                     |        |                        | 3                             | 43   | 51    | 70    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category              |        |                        | 377                           | 356  | 310   | 213   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | 02-15-2022       | —              |
| 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   |               |                   |                |            |               |              |               |              |               | —                  | —                | —              |

| Balanced                              |       |             |       |       |       |      |  |       |      |      |  |  |  |      |  |            |            |            |
|---------------------------------------|-------|-------------|-------|-------|-------|------|--|-------|------|------|--|--|--|------|--|------------|------------|------------|
| Vanguard LifeStrategy Cnsvr Gr Inv    | VSCGX | Target Risk | 10.51 | 8.47  | 5.11  | 5.38 |  | 9.47  | 0.98 | 3.35 |  |  |  | 0.12 |  | 3          | 1-Low      | —          |
| percentile rank                       |       |             | 24    | 25    | 57    | 15   |  |       |      |      |  |  |  |      |  |            |            |            |
| # of funds in category                |       |             | 248   | —     | —     | —    |  |       |      |      |  |  |  |      |  | 05-31-2025 | 07-19-2023 | —          |
| Vanguard LifeStrategy Growth Inv      | VASGX | Target Risk | 14.51 | 14.09 | 10.75 | 8.66 |  | 13.15 | 0.99 | 3.35 |  |  |  | 0.14 |  | 3          | 1-Low      | Low Risk   |
| percentile rank                       |       |             | 29    | 21    | 28    | 15   |  |       |      |      |  |  |  |      |  |            |            |            |
| # of funds in category                |       |             | 200   | —     | —     | —    |  |       |      |      |  |  |  |      |  | 05-31-2025 | 07-19-2023 | 12-31-2022 |
| Vanguard LifeStrategy Income Inv      | VASIX | Target Risk | 8.31  | 5.63  | 2.27  | 3.62 |  | 7.83  | 0.94 | 3.35 |  |  |  | 0.11 |  | 4          | 1-Low      | —          |
| percentile rank                       |       |             | 36    | 68    | 86    | 54   |  |       |      |      |  |  |  |      |  |            |            |            |
| # of funds in category                |       |             | 77    | —     | —     | —    |  |       |      |      |  |  |  |      |  | 05-31-2025 | 07-19-2023 | —          |
| 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 |