

KYMERA INDEPENDENT PHYSICIANS 401K

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																				
American Funds Invmt Co of Amer R6 percentile rank # of funds in category	RICGX	Large Blend	21.19 4 1,431	23.46 3 1,323	17.75 7 1,210	13.21 23 916	🟢	14.61	0.90	33.35	🟢	🇺🇸	🟢	0.27	🟢	2	—	Low Risk		
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	15.12 28 1,431	19.66 23 1,323	16.60 21 1,210	13.60 9 916	🟢	15.80	1.00	7.59	🟢	🇺🇸	🟢	0.04	🟢	3	1-Low	Low Risk		
Vanguard Growth Index Admiral percentile rank # of funds in category	VIGAX	Large Growth	17.92 27 1,107	26.07 28 1,057	17.45 18 977	16.18 15 768	🟢	19.74	1.06	30.52	🟢	🇺🇸	🟢	0.05	🟢	3	1-Low	Low Risk		
American Funds Washington Mutual R6 percentile rank # of funds in category	RWMGX	Large Value	16.90 9 1,431	17.30 63 1,323	16.44 27 1,210	12.76 39 916	🟢	13.23	0.80	28.02	🟢	🇺🇸	🟢	0.26	🟢	2	1-Low	Low Risk		
Vanguard Mid-Cap Growth Index Admiral percentile rank # of funds in category	VMGMX	Mid-Cap Growth	24.78 16 507	18.38 21 492	12.21 17 459	11.16 24 379	🟢	19.85	0.95	1.91	🔴	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk		
Vanguard Selected Value Inv percentile rank # of funds in category	VASVX	Mid-Cap Value	8.58 53 421	14.25 16 392	17.23 18 366	8.90 31 287	🟢	19.57	1.02	20.36	🟢	🇺🇸	🟢	0.42	🟢	4	—	Medium Risk		
Vanguard Small Cap Growth Index Admiral percentile rank # of funds in category	VSGAX	Small Growth	11.33 24 554	12.77 29 537	7.36 60 522	8.30 49 405	🟢	21.82	0.95	20.51	🟢	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk		
Vanguard Small Cap Value Index Admiral percentile rank # of funds in category	VSIAX	Small Value	9.12 19 501	11.65 22 484	15.18 35 453	8.39 20 373	🟢	20.93	0.89	9.18	🟢	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk		
Non-US Stock																				
Vanguard Emerging Mkts Stock Idx Adm percentile rank # of funds in category	VEMAX	Diversified Emerging Mkts	15.61 29 778	9.37 63 720	7.43 46 638	4.76 49 459	🟢	15.75	0.91	16.85	🟢	🇺🇸	🟢	0.13	🟢	2	1-Low	Medium Risk		
American Funds Intl Gr and Inc R6 percentile rank # of funds in category	RIGGX	Foreign Large Blend	18.79 39 764	15.13 48 713	11.36 31 669	6.53 40 469	🟢	15.10	0.98	16.76	🟢	🇺🇸	🟢	0.54	🟢	3	1-Low	Low Risk		
Vanguard International Growth Adm percentile rank # of funds in category	VWILX	Foreign Large Growth	17.94 32 391	13.87 48 368	7.34 55 336	9.60 6 224	🟢	20.94	1.23	15.52	🟢	🇺🇸	🟢	0.25	🟢	3	—	Low Risk		
⚠️ Vanguard International Value Inv percentile rank # of funds in category	VTRIX	Foreign Large Value	13.71 97 359	12.51 92 344	10.70 83 325	5.58 77 241	🟢	16.02	1.00	15.10	🟢	🇺🇸	🔴	0.36	🟢	3	—	Medium Risk		
DFA Global Equity I percentile rank # of funds in category	DGEIX	Global Stock	14.31 45 334	16.29 43 315	14.91 10 299	10.12 22 201	🟢	15.71	1.05	13.35	🟢	—	🟢	0.26	🟢	1	—	Medium Risk		

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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	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	—	—	
Neuberger Berman Real Estate R6	NRREX	Real Estate	9.23	2.66	5.79	6.98	✓	19.79	1.00	19.51	✓	—	✓	0.75	✓	3	—	Low Risk	
percentile rank			46	76	78	12													
# of funds in category			225	218	201	153										05-31-2025	—	12-31-2022	
Fixed Income																			
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	6.67	5.24	1.82	3.32	✓	4.53	0.54	10.77	✓	—	—	0.75	✓	3	—	—	
percentile rank			27	10	9	3													
# of funds in category			107	101	96	60										05-31-2025	—	—	
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	9.45	9.12	5.19	4.93	✓	6.74	0.98	2.84	✖	—	—	0.12	✓	2	—	—	
percentile rank			39	57	64	28													
# of funds in category			629	602	560	437										04-30-2025	—	—	
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation- Protected Bond	5.68	2.16	1.52	2.58	✓	6.88	1.00	3.64	✓	—	—	0.10	✓	3	—	—	
percentile rank			57	62	49	36													
# of funds in category			161	152	141	117										05-31-2025	—	—	
BNY Mellon Bond Market Index I	DBIRX	Intermediate- Term Bond	5.95	2.40	-0.91	1.57	✓	7.26	0.99	3.67	✓	☐	—	0.15	✓	3	—	—	
percentile rank			61	75	78	65													
# of funds in category			523	480	423	301										05-31-2025	—	—	
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	—	
Lincoln Stable Value Account -LNGPA		Stable Value	—	—	—	—	—	—	—	42.19	✓	—	—	—	—	—	—	—	
percentile rank			—	—	—	—													
# of funds in category			13	—	—	—										—	—	—	
Vanguard Ultra-Short-Term Bond Admiral	VUSFX	Ultrashort Bond	5.71	4.82	2.82	2.37	✓	0.90	0.10	5.62	✓	—	—	0.09	✓	3	—	—	
percentile rank			24	64	60	45													
# of funds in category			257	212	188	114										05-31-2025	—	—	
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	—	

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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	