

WESTMORELAND ELECTRIC SERVICES 401K

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/<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 |
| UpdatedUpdatedUpdated                    |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| 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              | 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     |
| 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     |

# WESTMORELAND ELECTRIC SERVICES 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/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |            |
|                                                                                              |        |              |                               |       |       |       |               |                   |                |            |               |              |               |              | <i>Updated</i>     | <i>Updated</i>   | <i>Updated</i> |            |
| American Funds New Perspective R6<br><i>percentile rank</i><br><i># of funds in category</i> | RNPGX  | Global Stock | 18.08                         | 18.88 | 13.84 | 12.17 | 🟢             | 15.79             | 1.05           | 24.59      | 🟢             | —            | 🟢             | 0.41         | 🟢                  | 2                | 2-Basic        | Low Risk   |
|                                                                                              |        |              | 23                            | 32    | 15    | 15    |               |                   |                |            |               |              |               |              |                    |                  |                |            |
|                                                                                              |        |              | 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-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-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 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

|                                         |       |             |       |      |      |      |   |      |      |       |   |   |   |      |   |            |   |   |
|-----------------------------------------|-------|-------------|-------|------|------|------|---|------|------|-------|---|---|---|------|---|------------|---|---|
| American Funds 2010 Trgt Date Retire R6 | RFTTX | Target Date | 12.10 | 8.39 | 6.53 | 5.96 | ✔ | 8.28 | 0.93 | 13.50 | ✔ | — | ✖ | 0.29 | ✔ | 3          | — | — |
| percentile rank                         |       |             | 1     | 18   | 1    | 1    |   |      |      |       |   |   |   |      |   |            |   |   |
| # of funds in category                  |       |             | 95    | 85   | 79   | 47   |   |      |      |       |   |   |   |      |   | 05-31-2025 | — | — |
| American Funds 2015 Trgt Date Retire R6 | RFJTX | Target Date | 12.22 | 8.86 | 6.91 | 6.27 | ✔ | 8.72 | 0.89 | 13.50 | ✔ | — | ✔ | 0.30 | ✔ | 2          | — | — |
| percentile rank                         |       |             | 1     | 10   | 1    | 1    |   |      |      |       |   |   |   |      |   |            |   |   |
| # of funds in category                  |       |             | 102   | 92   | 88   | 55   |   |      |      |       |   |   |   |      |   | 05-31-2025 | — | — |
| American Funds 2020 Trgt Date Retire R6 | RRCTX | Target Date | 12.75 | 9.52 | 7.26 | 6.68 | ✔ | 9.20 | 0.86 | 13.50 | ✔ | — | ✔ | 0.30 | ✔ | 3          | — | — |
| percentile rank                         |       |             | 1     | 13   | 7    | 1    |   |      |      |       |   |   |   |      |   |            |   |   |
| # of funds in category                  |       |             | 131   | 117  | 106  | 62   |   |      |      |       |   |   |   |      |   | 05-31-2025 | — | — |

WESTMORELAND ELECTRIC SERVICES 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/<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 2025 Trgt Date Retire R6 | RFDTX  | Target Date       | 12.73                         | 10.20 | 7.78  | 7.34  |               | 9.68              | 0.85           | 13.50      |               | —            |               | 0.31         |               | 3                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 17    | 5     | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 193                           | 178   | 151   | 99    |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 06-30-2022     |
| American Funds 2030 Trgt Date Retire R6 | RFETX  | Target Date       | 13.55                         | 11.84 | 9.07  | 8.23  |               | 10.73             | 0.88           | 13.50      |               | —            |               | 0.33         |               | 3                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 3     | 2     | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 239                           | 223   | 190   | 130   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2035 Trgt Date Retire R6 | RFFTX  | Target Date       | 14.63                         | 13.75 | 10.64 | 9.35  |               | 11.80             | 0.90           | 13.50      |               | —            |               | 0.34         |               | 3                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 2     | 6     | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 235                           | 214   | 183   | 130   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2040 Trgt Date Retire R6 | RFGTK  | Target Date       | 16.14                         | 15.77 | 11.95 | 10.08 |               | 13.00             | 0.94           | 13.50      |               | —            |               | 0.36         |               | 2                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 2     | 12    | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 235                           | 218   | 185   | 130   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2045 Trgt Date Retire R6 | RFHTX  | Target Date       | 16.52                         | 16.32 | 12.23 | 10.28 |               | 13.43             | 0.93           | 13.50      |               | —            |               | 0.37         |               | 2                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 3     | 19    | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 229                           | 214   | 183   | 130   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2050 Trgt Date Retire R6 | RFITX  | Target Date       | 16.52                         | 16.63 | 12.27 | 10.35 |               | 13.63             | 0.92           | 13.50      |               | —            |               | 0.37         |               | 2                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 6     | 28    | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 233                           | 216   | 185   | 130   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2055 Trgt Date Retire R6 | RFKTX  | Target Date       | 16.49                         | 16.90 | 12.25 | 10.34 |               | 13.86             | 0.93           | 13.50      |               | —            |               | 0.39         |               | 2                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 4     | 39    | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 228                           | 213   | 182   | 130   |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2060 Trgt Date Retire R6 | RFUTX  | Target Date       | 16.50                         | 16.95 | 12.23 | 10.33 |               | 13.91             | 1.17           | 10.27      |               | —            |               | 0.39         |               | 2                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 4     | 45    | 1     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 227                           | 212   | 176   | 73    |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2065 Trgt Date Retire R6 | RFVFX  | Target Date       | 16.47                         | 16.98 | 12.25 | —     |               | 13.89             | 1.17           | 5.50       |               | —            |               | 0.39         |               | 2                  | —                | Low Risk       |
| percentile rank                         |        |                   | 1                             | 4     | 48    | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 292                           | 180   | 86    | —     |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | 12-31-2022     |
| American Funds 2070 Trgt Date Retire R6 | RFBFX  | Target Date       | 16.48                         | —     | —     | —     | —             | —                 | —              | 1.50       |               | —            |               | 0.39         |               | 2                  | —                | —              |
| percentile rank                         |        |                   | 1                             | —     | —     | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| # of funds in category                  |        |                   | 292                           | 180   | 86    | —     |               |                   |                |            |               |              |               |              |               | 05-31-2025         | —                | —              |
| 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     |