

BRENNAN CENTER FOR JUSTICE 401K

Screens Summary (Data as of 06-30-2026)

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																		
Nuveen Large Cap Responsible Eq R6 percentile rank	TISCX	Large Blend	21.78 45	19.45 50	11.46 61	14.66 46	🟢	13.90	1.03	20.51	🟢	🇺🇸	🟢	0.17	🟢	5	3-Advanced	Low Risk
# of funds in category			1,444	1,334	1,245	988										06-30-2026	03-11-2022	12-31-2022
Vanguard 500 Index Admiral percentile rank	VFIAX	Large Blend Index	22.27 35	20.56 27	13.36 21	15.46 18	🟢	13.05	1.00	8.59	🟢	🇺🇸	🟢	0.04	🟢	3	1-Low	Low Risk
# of funds in category			1,444	1,334	1,245	988										06-30-2026	02-15-2022	12-31-2022
MFS Growth R6 percentile rank	MFEKX	Large Growth	9.17 78	19.18 70	9.67 62	16.19 52	🟢	16.44	0.97	5.00	🟢	🇺🇸	🟢	0.52	🟢	4	2-Basic	Low Risk
# of funds in category			1,189	1,108	1,057	865										06-30-2026	02-15-2022	12-31-2022
Invesco Growth and Income R6 percentile rank	GIFFX	Large Value	18.42 67	16.57 44	11.03 41	11.99 37	🟢	12.80	0.96	23.35	🟢	🇺🇸	🟢	0.42	🟢	3	-	Medium Risk
# of funds in category			1,214	1,161	1,097	928										06-30-2026	-	12-31-2022
State St S&P Mid Cap® Idx NL Cl C percentile rank		Mid-Cap Blend	25.79 37	15.35 51	9.01 42	11.59 42	🟢	15.86	1.04	29.78	🟢	🇺🇸	🔴	0.05	🟢	2	-	Medium Risk
# of funds in category			485	433	409	314										06-30-2026	-	12-31-2022
State St Russell Sm Cap® Gr Idx NL Cl C percentile rank		Small Growth	38.81 34	18.46 31	5.49 45	11.86 54	🟢	21.26	1.00	16.83	🟢	🇺🇸	🟢	0.05	🟢	2	-	Medium Risk
# of funds in category			641	627	601	491										06-30-2026	-	12-31-2022
State St Russell Sm Cp® Val Idx NL Cl C percentile rank		Small Value	43.02 11	18.69 21	8.18 60	10.89 39	🟢	19.43	1.00	16.83	🟢	🇺🇸	🟢	0.05	🟢	2	-	Medium Risk
# of funds in category			557	534	512	430										06-30-2026	-	12-31-2022
Non-US Stock																		
American Funds New World R-6 percentile rank	RNWGX	Diversified Emerging Mkts	29.73 77	18.51 72	6.82 55	11.36 12	🟢	13.67	0.72	27.05	🟢	🇺🇸	🟢	0.57	🟢	4	1-Low	Medium Risk
# of funds in category			805	769	707	535										06-30-2026	02-15-2022	12-31-2022
American Funds Intl Gr and Inc R-6 percentile rank	RIGGX	Foreign Large Blend	24.94 29	18.16 32	9.09 37	10.12 30	🟢	12.33	0.86	17.76	🟢	🇺🇸	🟢	0.53	🟢	2	1-Low	Low Risk
# of funds in category			820	784	738	583										06-30-2026	02-15-2022	12-31-2022
Vanguard Developed Markets Index Admiral percentile rank	VTMGX	Foreign Large Blend Index	28.62 11	19.26 19	10.10 17	10.50 20	🟢	13.86	0.97	13.36	🟢	🇺🇸	🟢	0.05	🟢	2	1-Low	Low Risk
# of funds in category			820	784	738	583										06-30-2026	02-15-2022	12-31-2022
Alternative																		
Vanguard Real Estate Index Admiral percentile rank	VGSIX	Real Estate	12.49 71	9.14 57	2.81 68	4.92 65	🟢	16.72	1.00	1.36	🔴	—	🟢	0.13	🟢	3	1-Low	Low Risk
# of funds in category			248	239	231	185										06-30-2026	02-15-2022	12-31-2022

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																Updated	Updated	Updated
Fixed Income																		
🚩 BlackRock Inflation Protected Bond K percentile rank # of funds in category	BPLBX	Inflation- Protected Bond	3.28 47 176	3.83 50 169	1.01 27 162	2.65 14 137	🟢	4.26	1.00	2.34	🔴	—	—	0.87	🔴	3	-	-
Baird Aggregate Bond Inst percentile rank # of funds in category	BAGIX	Intermediate- Term Bond	3.96 29 545	4.61 24 509	0.32 23 471	1.94 18 351	🟢	5.65	1.02	25.77	🟢	🇺🇸	—	0.30	🟢	4	1-Low	-
PIMCO Income Instl percentile rank # of funds in category	PIMIX	Multisector Bond	6.78 12 408	7.77 21 387	3.83 17 352	4.81 11 262	🟢	4.62	0.83	19.27	🟢	—	—	0.54	🟢	4	-	-
Lincoln NY Stable Value Account -LYGPA percentile rank # of funds in category		Stable Value	- - 82	- - -	- - -	- - -	—	-	-	29.76	🟢	—	—	-	—	-	-	-
Federated Hermes Govt Ultrashort R6 percentile rank # of funds in category	FGULX	Ultrashort Bond	4.63 14 254	5.14 53 231	3.63 50 189	2.50 70 123	🟢	0.63	0.10	28.99	🟢	—	—	0.24	🟢	-	-	-
Balanced																		
Vanguard LifeStrategy 20/80 Inv percentile rank # of funds in category	VASIX	Target Risk	7.53 72 93	7.29 67 90	2.36 83 86	3.88 66 74	🟢	5.84	0.92	4.35	🟢	🇺🇸	🟢	0.10	🟢	3	1-Low	-
Vanguard LifeStrategy 40/60 Inv percentile rank # of funds in category	VSCGX	Target Risk	11.74 52 247	10.41 26 240	4.53 34 233	6.22 25 191	🟢	7.25	0.95	4.35	🟢	🇺🇸	🟢	0.10	🟢	3	1-Low	-
Vanguard LifeStrategy 60/40 Inv Shrs percentile rank # of funds in category	VSMGX	Target Risk	16.08 53 448	13.52 32 441	6.65 37 427	8.49 21 353	🟢	8.89	0.94	4.35	🟢	🇺🇸	🟢	0.10	🟢	3	1-Low	Low Risk
Vanguard LifeStrategy 80/20 Inv Shrs percentile rank # of funds in category	VASGX	Target Risk	20.50 27 199	16.67 16 195	8.78 23 191	10.76 13 160	🟢	10.61	0.96	4.35	🟢	🇺🇸	🟢	0.10	🟢	3	1-Low	Low Risk