

BIKUR CHOLIM INC 403B PLAN

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																			
American Funds Invmt Co of Amer R-6 percentile rank	RICGX	Large Blend	19.70 59	22.76 8	14.81 8	14.71 45	✔	13.12	0.98	34.35	✔	🗲	✔	0.27	✔	2	-	Low Risk	
# of funds in category			1,444	1,334	1,245	988										06-30-2026	-	12-31-2022	
Fidelity 500 Index percentile rank	FXAIX	Large Blend Index	22.31 34	20.60 25	13.39 19	15.49 17	✔	13.05	1.00	17.42	✔	🗲	✔	0.02	✔	3	1-Low	Low Risk	
# of funds in category			1,444	1,334	1,245	988										06-30-2026	07-19-2023	12-31-2022	
JPMorgan Large Cap Growth R6 percentile rank	JLGMX	Large Growth	15.56 57	21.81 47	12.66 33	20.30 7	✔	16.18	0.96	21.92	✔	🗲	✔	0.44	✔	2	2-Basic	Low Risk	
# of funds in category			1,189	1,108	1,057	865										06-30-2026	04-07-2022	12-31-2022	
Vanguard Windsor II Admiral percentile rank	VWNAX	Large Value	19.37 63	16.48 44	10.54 51	13.08 16	✔	11.30	0.84	22.57	✔	🗲	✖	0.24	✔	3	-	Low Risk	
# of funds in category			1,214	1,161	1,097	928										06-30-2026	-	12-31-2022	
Vanguard Morn Mid Cap Growth Index Adm percentile rank	VMGMX	Mid-Cap Growth	8.50 65	15.00 48	6.06 32	12.44 38	✔	17.34	0.94	2.91	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
# of funds in category			573	553	535	460										06-30-2026	02-15-2022	12-31-2022	
Vanguard Morn Mid Cap Value Index Adm percentile rank	VMVAX	Mid-Cap Value	22.61 44	15.14 43	9.45 48	10.76 46	✔	13.40	0.89	2.91	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
# of funds in category			467	439	418	347										06-30-2026	02-15-2022	12-31-2022	
Vanguard Morn Small Cap Growth Idx Adm percentile rank	VSGAX	Small Growth	32.73 52	17.46 36	5.37 45	12.15 45	✔	19.18	0.88	1.36	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
# of funds in category			641	627	601	491										06-30-2026	02-15-2022	12-31-2022	
Vanguard Morn Small Cap Value Index Adm percentile rank	VSIAX	Small Value	27.00 74	16.08 47	9.22 40	10.99 34	✔	16.43	0.82	1.36	✖	🗲	✔	0.07	✔	5	1-Low	Medium Risk	
# of funds in category			557	534	512	430										06-30-2026	02-15-2022	12-31-2022	
Non-US Stock																			
Vanguard Emerging Mkts Stock Idx Adm percentile rank	VEMAX	Diversified Emerging Mkts	24.01 83	17.05 80	5.05 74	8.43 74	✔	12.42	0.65	17.85	✔	🗲	✔	0.13	✔	2	1-Low	Medium Risk	
# of funds in category			805	769	707	535										06-30-2026	02-15-2022	12-31-2022	
Nuveen International Res Eq R6 percentile rank	TSONX	Foreign Large Blend	17.67 77	15.31 75	8.76 46	9.66 50	✔	13.18	0.89	10.90	✔	🗲	✔	0.20	✔	4	3-Advanced	Low Risk	
# of funds in category			820	784	738	583										06-30-2026	03-11-2022	12-31-2022	
Vanguard International Growth Adm percentile rank	VWILX	Foreign Large Growth	9.60 63	12.11 55	0.65 82	11.56 9	✔	16.14	1.04	16.52	✔	🗲	✔	0.26	✔	3	-	Low Risk	
# of funds in category			423	399	382	265										06-30-2026	-	12-31-2022	
🚩 Vanguard International Value Inv percentile rank	VTRIX	Foreign Large Value	27.97 35	15.60 85	8.53 84	9.56 60	✔	13.54	0.97	13.92	✔	🗲	✖	0.36	✔	3	-	Medium Risk	
# of funds in category			400	376	364	289										06-30-2026	-	12-31-2022	
American Funds New Perspective R-6 percentile rank	RNPGX	Global Stock	15.81 43	17.62 36	8.65 31	14.01 23	✔	12.90	1.00	25.59	✔	—	✔	0.40	✔	3	2-Basic	Low Risk	
# of funds in category			316	304	290	214										06-30-2026	02-15-2022	12-31-2022	

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																Updated	Updated	Updated
Alternative																		
PIMCO Commodity and Real Ret Bd Alp Inst percentile rank	PCRIX	Commodities Broad Basket	26.75 40	12.87 39	8.92 64	6.63 51	✔	12.93	0.95	7.67	✔	—	—	0.90	✔	3	-	-
# of funds in category			128	119	113	85										06-30-2026	-	-
Vanguard Real Estate Index Admiral percentile rank	VGSLX	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
Fixed Income																		
PIMCO International Bond (USD-Hdg) Instl percentile rank	PFORX	Global Bond	2.93 67	5.57 20	1.81 13	2.81 15	✔	3.72	0.53	11.77	✔	—	—	0.57	✔	3	-	-
# of funds in category			132	126	123	86										06-30-2026	-	-
Vanguard High-Yield Corporate Adm percentile rank	VWEAX	High Yield Bond	5.72 45	8.18 53	4.05 38	5.26 40	✔	3.99	0.91	3.84	✔	—	—	0.12	✔	1	-	-
# of funds in category			654	628	591	483										04-30-2026	-	-
Vanguard Inflation-Protected Secs Adm percentile rank	VAIPX	Inflation- Protected Bond	3.42 26	3.94 39	0.93 44	2.46 44	✔	4.22	1.00	0.21	✖	—	—	0.10	✔	3	-	-
# of funds in category			176	169	162	137										06-30-2026	-	-
Baird Aggregate Bond Inst percentile rank	BAGIX	Intermediate- Term Bond	3.96 29	4.61 24	0.32 23	1.94 18	✔	5.65	1.02	25.77	✔	☐	—	0.30	✔	4	1-Low	-
# of funds in category			545	509	471	351										06-30-2026	02-15-2022	-
Loomis Sayles Investment Grade Bond N percentile rank	LGBNX	Multisector Bond	4.04 52	5.23 25	1.20 14	3.30 3	✔	5.51	0.98	19.76	✔	—	—	0.43	✔	2	1-Low	-
# of funds in category			624	585	548	434										06-30-2026	02-15-2022	-
Lincoln NY Stable Value Account -LYGPA percentile rank		Stable Value	- -	- -	- -	- -	—	-	-	29.76	✔	—	—	-	—	-	-	-
# of funds in category			82	-	-	-										-	-	-
Vanguard Ultra-Short-Term Bond Admiral percentile rank	VUSFX	Ultrashort Bond	4.20 43	5.28 40	3.45 74	2.68 49	✔	0.67	0.09	6.62	✔	—	—	0.09	✔	3	-	-
# of funds in category			254	231	189	123										06-30-2026	-	-
Balanced																		
American Funds American Balanced R-6 percentile rank	RLBGX	Moderate Allocation	21.02 7	17.32 3	10.06 1	10.67 7	✔	9.32	1.03	27.51	✔	—	✔	0.25	✔	3	1-Low	Low Risk
# of funds in category			535	512	494	423										06-30-2026	02-15-2022	12-31-2022