

CYPRESS HILLS CEMETERY SECTION

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																		
DFA US Core Equity 1 I percentile rank	DFOFX	Large Blend	23.69	19.59	12.49	14.69	🟢	13.03	0.97	14.35	🟢	🟢	🟢	0.15	🟢	2	-	Medium Risk
# of funds in category			23	48	42	45												
			1,444	1,334	1,245	988										06-30-2026	-	12-31-2022
Vanguard 500 Index Admiral percentile rank	VFIAX	Large Blend Index	22.27	20.56	13.36	15.46	🟢	13.05	1.00	8.59	🟢	🟢	🟢	0.04	🟢	3	1-Low	Low Risk
# of funds in category			35	27	21	18												
			1,444	1,334	1,245	988										06-30-2026	02-15-2022	12-31-2022
JPMorgan Large Cap Growth R6 percentile rank	JLGMX	Large Growth	15.56	21.81	12.66	20.30	🟢	16.18	0.96	21.92	🟢	🟢	🟢	0.44	🟢	2	2-Basic	Low Risk
# of funds in category			57	47	33	7												
			1,189	1,108	1,057	865										06-30-2026	04-07-2022	12-31-2022
Vanguard Equity-Income Adm percentile rank	VEIRX	Large Value	18.39	15.97	11.28	11.78	🟢	11.01	0.84	5.34	🟢	🟢	🟢	0.17	🟢	3	-	Medium Risk
# of funds in category			68	51	35	43												
			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	15.00	6.06	12.44	🟢	17.34	0.94	2.91	🔴	🟢	🟢	0.07	🟢	4	1-Low	Medium Risk
# of funds in category			65	48	32	38												
			573	553	535	460										06-30-2026	02-15-2022	12-31-2022
Allspring Special Mid Cap Value R6 percentile rank	WFRPX	Mid-Cap Value	18.87	11.59	9.01	10.72	🟢	13.39	0.88	17.45	🟢	🟢	🟢	0.70	🟢	4	-	Medium Risk
# of funds in category			62	76	55	47												
			467	439	418	347										06-30-2026	-	12-31-2022
Vanguard Morn Small Cap Growth Idx Adm percentile rank	VSGAX	Small Growth	32.73	17.46	5.37	12.15	🟢	19.18	0.88	1.36	🔴	🟢	🟢	0.07	🟢	4	1-Low	Medium Risk
# of funds in category			52	36	45	45												
			641	627	601	491										06-30-2026	02-15-2022	12-31-2022
DFA US Small Cap Value I percentile rank	DFS VX	Small Value	33.18	17.06	11.43	11.93	🟢	18.50	0.93	14.35	🟢	🟢	🟢	0.31	🟢	3	-	Medium Risk
# of funds in category			48	35	12	16												
			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	18.51	6.82	11.36	🟢	13.67	0.72	27.05	🟢	🟢	🟢	0.57	🟢	4	1-Low	Medium Risk
# of funds in category			77	72	55	12												
			805	769	707	535										06-30-2026	02-15-2022	12-31-2022
🔴 MFS Research International R6 percentile rank	MRSKX	Foreign Large Blend	16.40	12.98	6.42	9.24	🟢	12.40	0.83	3.50	🟢	🟢	🟢	0.64	🟢	3	2-Basic	Low Risk
# of funds in category			82	90	86	63												
			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	19.26	10.10	10.50	🟢	13.86	0.97	13.36	🟢	🟢	🟢	0.05	🟢	2	1-Low	Low Risk
# of funds in category			11	19	17	20												
			820	784	738	583										06-30-2026	02-15-2022	12-31-2022
Vanguard International Growth Adm percentile rank	VWILX	Foreign Large Growth	9.60	12.11	0.65	11.56	🟢	16.14	1.04	16.52	🟢	🟢	🟢	0.26	🟢	3	-	Low Risk
# of funds in category			63	55	82	9												
			423	399	382	265										06-30-2026	-	12-31-2022
Causeway International Value Instl percentile rank	CIVIX	Foreign Large Value	22.75	17.88	12.85	10.82	🟢	14.38	1.00	24.69	🟢	🟢	🔴	0.85	🟢	4	-	Low Risk
# of funds in category			64	70	28	30												
			400	376	364	289										06-30-2026	-	12-31-2022

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																Updated	Updated	Updated
DFA Global Equity I	DGEIX	Global Stock	24.75	19.10	11.31	12.94	🟢	12.42	0.95	14.35	🟢	—	🟢	0.25	🟢	1	-	Medium Risk
percentile rank			24	33	20	18												
# of funds in category			347	316	310	229										06-30-2026	-	12-31-2022

Alternative

PIMCO Commodity and Real Ret Bd Alp Inst	PCRIX	Commodities Broad Basket	26.75	12.87	8.92	6.63	✔	12.93	0.95	7.67	✔	—	—	0.90	✔	3	—	—
percentile rank			40	39	64	51												
# of funds in category			128	119	113	85										06-30-2026	—	—
DFA Real Estate Securities I	DFREX	Real Estate	14.60	9.96	3.64	5.68	✔	16.60	1.00	14.35	✔	—	✔	0.18	✔	3	—	Low Risk
percentile rank			45	38	44	36												
# of funds in category			248	239	231	185										06-30-2026	—	12-31-2022

Fixed Income

American Funds Capital World Bd R-6	RCWGX	Global Bond	-0.01	3.39	-1.78	0.68	🟢	7.35	0.87	7.34	🟢	—	—	0.48	🟢	2	1-Low	—
percentile rank			70	73	71	57												
# of funds in category			169	169	167	147										06-30-2026	02-15-2022	—
PGIM High Yield R6	PHYQX	High Yield Bond	5.92	9.08	4.15	6.01	🟢	4.58	1.05	18.72	🟢	—	—	0.38	🟢	1	—	—
percentile rank			39	18	33	12												
# of funds in category			654	628	591	483										12-31-2024	—	—
🟡 BlackRock Inflation Protected Bond K	BPLBX	Inflation-Protected Bond	3.28	3.83	1.01	2.65	🟢	4.26	1.00	2.34	🔴	—	—	0.87	🔴	3	—	—
percentile rank			47	50	27	14												
# of funds in category			176	169	162	137										10-31-2025	—	—
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	3.96	4.61	0.32	1.94	🟢	5.65	1.02	25.77	🟢	🟡	—	0.30	🟢	4	1-Low	—
percentile rank			29	24	23	18												
# of funds in category			545	509	471	351										06-30-2026	02-15-2022	—
PIMCO Income Instl	PIMIX	Multisector Bond	6.78	7.77	3.83	4.81	🟢	4.62	0.83	19.27	🟢	—	—	0.54	🟢	4	—	—
percentile rank			12	21	17	11												
# of funds in category			408	387	352	262										06-30-2026	—	—
Lincoln NY Stable Value Account -LYGPA		Stable Value	—	—	—	—	—	—	—	29.76	🟢	—	—	—	—	—	—	—
percentile rank			—	—	—	—												
# of funds in category			82	—	—	—										—	—	—
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	4.23	5.18	3.78	2.77	🟢	0.37	0.04	12.50	🟢	—	—	0.15	🟢	4	1-Low	—
percentile rank			41	49	30	39												
# of funds in category			254	231	189	123										06-30-2026	02-15-2022	—

Target Date

BlackRock LifePath® Index 2030 K	LINKX	Target Date	13.71	11.92	5.65	8.24		8.55	0.91	6.08		—		0.09		4	1-Low	Low Risk
percentile rank			63	64	65	67												
# of funds in category			270	261	241	171										06-30-2026	04-07-2022	12-31-2022
BlackRock LifePath® Index 2035 K	LUJX	Target Date	16.16	13.75	6.91	9.44		9.57	0.93	6.08		—		0.09		3	1-Low	Low Risk
percentile rank			60	62	58	60												
# of funds in category			265	257	237	168										06-30-2026	04-07-2022	12-31-2022

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																Updated	Updated	Updated
BlackRock LifePath® Index 2040 K percentile rank # of funds in category	LIKX	Target Date	18.60 61 270	15.53 57 259	8.13 50 239	10.55 45 171	🟢	10.49	0.94	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2045 K percentile rank # of funds in category	LIHX	Target Date	21.11 42 264	17.25 34 257	9.28 33 237	11.51 34 168	🟢	11.37	0.96	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2050 K percentile rank # of funds in category	LIPX	Target Date	23.23 22 269	18.71 12 259	10.20 10 239	12.13 10 171	🟢	12.04	0.98	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2055 K percentile rank # of funds in category	LIVX	Target Date	24.28 12 263	19.41 10 256	10.62 8 236	12.36 9 168	🟢	12.28	0.98	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2060 K percentile rank # of funds in category	LIZX	Target Date	24.46 12 262	19.50 10 255	10.67 8 235	12.40 11 127	🟢	12.34	1.28	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2065 K percentile rank # of funds in category	LIWX	Target Date	24.41 14 249	19.46 10 236	10.67 9 188	- - -	🟢	12.33	1.27	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk
BlackRock LifePath® Index 2070 K percentile rank # of funds in category	LIYX	Target Date	24.36 23 145	- - 23	- - -	- - -	—	-	-	1.76	🔴	—	🟢	0.09	🟢	3	-	-
BlackRock LifePath® Index Retire K percentile rank # of funds in category	LIRX	Target Date	11.62 11 201	9.98 13 197	4.20 32 181	6.11 11 122	🟢	7.31	1.14	6.08	🟢	—	🟢	0.09	🟢	4	1-Low	-
Balanced																		
American Funds American Balanced R-6 percentile rank # of funds in category	RLBGX	Moderate Allocation	21.02 7 535	17.32 3 512	10.06 1 494	10.67 7 423	🟢	9.32	1.03	27.51	🟢	—	🟢	0.25	🟢	3	1-Low	Low Risk