

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	DFEOX	Large Blend	23.69	19.59	12.49	14.69	✓	13.03	0.97	14.35	✓	■	✓	0.15	✓	2	-	Medium Risk
percentile rank			23	48	42	45												
# of funds in category			1,444	1,334	1,245	988										06-30-2026	-	12-31-2022
Vanguard 500 Index Admiral	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
percentile rank			35	27	21	18												
# of funds in category			1,444	1,334	1,245	988										06-30-2026	02-15-2022	12-31-2022
JPMorgan Large Cap Growth R6	JLGMX	Large Growth	15.56	21.81	12.66	20.30	✓	16.18	0.96	21.92	✓	■	✓	0.44	✓	2	2-Basic	Low Risk
percentile rank			57	47	33	7												
# of funds in category			1,189	1,108	1,057	865										06-30-2026	04-07-2022	12-31-2022
Vanguard Equity-Income Adm	VEIRX	Large Value	18.39	15.97	11.28	11.78	✓	11.01	0.84	5.34	✓	■	✓	0.17	✓	3	-	Medium Risk
percentile rank			68	51	35	43												
# of funds in category			1,214	1,161	1,097	928										06-30-2026	-	12-31-2022
Vanguard Morn Mid Cap Growth Index Adm	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
percentile rank			65	48	32	38												
# of funds in category			573	553	535	460										06-30-2026	02-15-2022	12-31-2022
Allspring Special Mid Cap Value R6	WFRPX	Mid-Cap Value	18.87	11.59	9.01	10.72	✓	13.39	0.88	17.45	✓	■	✓	0.70	✓	4	-	Medium Risk
percentile rank			62	76	55	47												
# of funds in category			467	439	418	347										06-30-2026	-	12-31-2022
Vanguard Morn Small Cap Growth Idx Adm	VSGAX	Small Growth	32.73	17.46	5.37	12.15	✓	19.18	0.88	1.36	✖	■	✓	0.07	✓	4	1-Low	Medium Risk
percentile rank			52	36	45	45												
# of funds in category			641	627	601	491										06-30-2026	02-15-2022	12-31-2022
DFA US Small Cap Value I	DFS VX	Small Value	33.18	17.06	11.43	11.93	✓	18.50	0.93	14.35	✓	■	✓	0.31	✓	3	-	Medium Risk
percentile rank			48	35	12	16												
# of funds in category			557	534	512	430										06-30-2026	-	12-31-2022
Non-US Stock																		
American Funds New World R-6	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
percentile rank			77	72	55	12												
# of funds in category			805	769	707	535										06-30-2026	02-15-2022	12-31-2022
⊖ MFS Research International R6	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
percentile rank			82	90	86	63												
# of funds in category			820	784	738	583										06-30-2026	02-15-2022	12-31-2022
Vanguard Developed Markets Index Admiral	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
percentile rank			11	19	17	20												
# of funds in category			820	784	738	583										06-30-2026	02-15-2022	12-31-2022
Vanguard International Growth Adm	VWILX	Foreign Large Growth	9.60	12.11	0.65	11.56	✓	16.14	1.04	16.52	✓	■	✓	0.26	✓	3	-	Low Risk
percentile rank			63	55	82	9												
# of funds in category			423	399	382	265										06-30-2026	-	12-31-2022
Causeway International Value Instl	CIVIX	Foreign Large Value	22.75	17.88	12.85	10.82	✓	14.38	1.00	24.69	✓	■	✖	0.85	✓	4	-	Low Risk
percentile rank			64	70	28	30												
# of funds in category			400	376	364	289										06-30-2026	-	12-31-2022

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																Updated	Updated	Updated
DFA Global Equity I percentile rank # of funds in category	DGEIX	Global Stock	24.75 24 347	19.10 33 316	11.31 20 310	12.94 18 229	🟢	12.42	0.95	14.35	🟢	—	🟢	0.25	🟢	1	-	Medium Risk
Alternative																		
PIMCO Commodity and Real Ret Bd Alp Inst percentile rank # of funds in category	PCRIX	Commodities Broad Basket	26.75 40 128	12.87 39 119	8.92 64 113	6.63 51 85	🟢	12.93	0.95	7.67	🟢	—	—	0.90	🟢	3	-	-
DFA Real Estate Securities I percentile rank # of funds in category	DFREX	Real Estate	14.60 45 248	9.96 38 239	3.64 44 231	5.68 36 185	🟢	16.60	1.00	14.35	🟢	—	🟢	0.18	🟢	3	-	Low Risk
Fixed Income																		
American Funds Capital World Bd R-6 percentile rank # of funds in category	RCWGX	Global Bond	-0.01 70 169	3.39 73 169	-1.78 71 167	0.68 57 147	🟢	7.35	0.87	7.34	🟢	—	—	0.48	🟢	2	1-Low	-
PGIM High Yield R6 percentile rank # of funds in category	PHYQX	High Yield Bond	5.92 39 654	9.08 18 628	4.15 33 591	6.01 12 483	🟢	4.58	1.05	18.72	🟢	—	—	0.38	🟢	1	-	-
🟡 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	🟢	—	—	-	—	-	-	-
Baird Ultra Short Bond Institutional percentile rank # of funds in category	BUBIX	Ultrashort Bond	4.23 41 254	5.18 49 231	3.78 30 189	2.77 39 123	🟢	0.37	0.04	12.50	🟢	—	—	0.15	🟢	4	1-Low	-
Target Date																		
BlackRock LifePath® Index 2030 K percentile rank # of funds in category	LINKX	Target Date	13.71 63 270	11.92 64 261	5.65 65 241	8.24 67 171	🟢	8.55	0.91	6.08	🟢	—	🟢	0.09	🟢	4	1-Low	Low Risk
BlackRock LifePath® Index 2035 K percentile rank # of funds in category	LIJKX	Target Date	16.16 60 265	13.75 62 257	6.91 58 237	9.44 60 168	🟢	9.57	0.93	6.08	🟢	—	🟢	0.09	🟢	3	1-Low	Low Risk

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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