

EAST WEST MANAGEMENT INSTITUTE 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																		
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
Fidelity Contrafund percentile rank	FCNTX	Large Growth	20.30 35	26.73 16	14.71 14	18.16 21	✔	14.33	0.79	35.81	✔	🗪	✔	0.74	✔	2	1-Low	Low Risk
# of funds in category			1,189	1,108	1,057	865										06-30-2026	02-15-2022	12-31-2022
American Funds Washington Mutual R-6 percentile rank	RWMGX	Large Value	15.69 80	18.01 28	12.66 14	13.70 10	✔	10.64	0.77	29.02	✔	🗪	✖	0.26	✔	4	1-Low	Low Risk
# of funds in category			1,214	1,161	1,097	928										06-30-2026	02-15-2022	12-31-2022
Vanguard Morn Mid Cap Index Admiral percentile rank	VIMAX	Mid-Cap Blend	16.75 75	15.32 52	7.94 68	11.77 38	✔	14.34	0.95	2.91	✖	🗪	✔	0.05	✔	4	1-Low	Medium Risk
# of funds in category			485	433	409	314										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																		
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
🔴 MFS Research International R4 percentile rank	MRSJX	Foreign Large Blend	16.28 83	12.85 90	6.31 86	9.12 67	✔	12.39	0.83	3.50	✔	🗪	✔	0.74	✔	3	2-Basic	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	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																		
🟡 BlackRock Inflation Protected Bond Instl percentile rank	BPRIX	Inflation-Protected Bond	3.26 47	3.76 55	0.95 39	2.59 23	✔	4.24	1.00	2.34	✖	—	—	0.92	✖	3	—	—
# of funds in category			176	169	162	137										10-31-2025	—	—

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																Updated	Updated	Updated
Vanguard Interm-Term Bond Index Adm percentile rank # of funds in category	VBILX	Intermediate- Term Bond	3.37 79 545	4.60 26 509	0.22 29 471	1.81 30 351	✔ 	5.75 	1.03 	18.19 	✔ 	☒ 	— 	0.06 	✔ 	2 	1-Low 	—
Loomis Sayles Income N percentile rank # of funds in category	LSBNX	Multisector Bond	4.16 84 408	7.19 43 387	2.14 72 352	3.37 70 262	✔ 	5.74 	1.03 	19.42 	✔ 	— 	— 	0.59 	✔ 	1 	1-Low 	—
Target Date																		
Vanguard Target Retirement 2020 Fund percentile rank # of funds in category	VTWNX	Target Date	10.65 81 145	10.04 72 139	4.64 72 121	6.99 51 84	✔ 	6.60 	0.83 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	4 	1-Low 	—
Vanguard Target Retirement 2025 Fund percentile rank # of funds in category	VTTVX	Target Date	13.63 39 176	12.13 20 169	5.84 19 150	8.17 21 102	✔ 	7.91 	0.91 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2030 Fund percentile rank # of funds in category	VTHRX	Target Date	15.90 23 270	13.62 13 261	6.78 16 241	9.11 18 171	✔ 	8.94 	0.95 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2035 Fund percentile rank # of funds in category	VTTX	Target Date	17.63 33 265	14.83 20 257	7.61 21 237	9.98 31 168	✔ 	9.58 	0.93 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2040 Fund percentile rank # of funds in category	VFORX	Target Date	19.33 46 270	16.04 38 259	8.42 37 239	10.83 31 171	✔ 	10.21 	0.92 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2045 Fund percentile rank # of funds in category	VTIVX	Target Date	21.03 46 264	17.17 40 257	9.20 40 237	11.54 28 168	✔ 	10.85 	0.92 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2050 Fund percentile rank # of funds in category	VFIX	Target Date	22.70 41 269	18.26 29 259	9.89 26 239	11.91 21 171	✔ 	11.44 	0.93 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2055 Fund percentile rank # of funds in category	VFPVX	Target Date	22.84 49 263	18.30 35 256	9.91 38 236	11.92 28 168	✔ 	11.48 	0.92 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2060 Fund percentile rank # of funds in category	VITSX	Target Date	22.82 57 262	18.29 39 255	9.91 39 235	11.92 40 127	✔ 	11.47 	1.19 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2065 Fund percentile rank # of funds in category	VLXVX	Target Date	22.82 57 249	18.29 42 236	9.92 44 188	— — —	✔ 	11.47 	1.19 	8.97 	✔ 	— 	✔ 	0.08 	✔ 	3 	1-Low 	Low Risk
Vanguard Target Retirement 2070 Fund percentile rank # of funds in category	VSVNX	Target Date	22.81 65 145	18.29 1 23	— — —	— — —	✔ 	11.46 	0.92 	4.01 	✔ 	— 	✔ 	0.08 	✔ 	3 	— 	Low Risk
Vanguard Target Retirement Income Fund percentile rank # of funds in category	VTINX	Target Date	9.72 63 201	9.11 52 197	4.06 47 181	5.35 48 122	✔ 	5.98 	0.93 	13.36 	✔ 	— 	✔ 	0.08 	✔ 	4 	1-Low 	—

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			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
			Balanced																	
Vanguard LifeStrategy 20/80 Inv percentile rank	VASIX	Target Risk	7.53	7.29	2.36	3.88	✔	5.84	0.92	4.35	✔	📊	✔	0.10	✔	3	1-Low	-		
# of funds in category			72	67	83	66														
			93	90	86	74										06-30-2026	07-19-2023	-		
Vanguard LifeStrategy 40/60 Inv percentile rank	VSCGX	Target Risk	11.74	10.41	4.53	6.22	✔	7.25	0.95	4.35	✔	📊	✔	0.10	✔	3	1-Low	-		
# of funds in category			52	26	34	25														
			247	240	233	191										06-30-2026	07-19-2023	-		
Vanguard LifeStrategy 60/40 Inv Shrs percentile rank	VSMGX	Target Risk	16.08	13.52	6.65	8.49	✔	8.89	0.94	4.35	✔	📊	✔	0.10	✔	3	1-Low	Low Risk		
# of funds in category			53	32	37	21														
			448	441	427	353										06-30-2026	07-19-2023	12-31-2022		
Vanguard LifeStrategy 80/20 Inv Shrs percentile rank	VASGX	Target Risk	20.50	16.67	8.78	10.76	✔	10.61	0.96	4.35	✔	📊	✔	0.10	✔	3	1-Low	Low Risk		
# of funds in category			27	16	23	13														
			199	195	191	160										06-30-2026	07-19-2023	12-31-2022		