JOHNSON MEMORIAL HOSPITAL DEFINED

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 Updated	Commit. Level Updated	Carbon Risk Updated
US Stock																		
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
Vanguard Morn Growth Index Admiral	VIGAX	Large Growth	18.59	22.91	13.17	18.00	✓	17.42	1.06	1.36	✗	▦	✓	0.05	✓	4	1-Low	Low Risk
percentile rank			42	36	29	23												
# of funds in category			1,189	1,108	1,057	865										06-30-2026	02-15-2022	12-31-2022
Vanguard Morn Value Index Admiral	VVIAX	Large Value	25.91	18.00	12.30	12.66	✓	11.56	0.90	1.36	✗	▦	✓	0.05	✓	3	1-Low	Medium Risk
percentile rank			24	28	18	23												
# 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	VIMAX	Mid-Cap Blend	16.75	15.32	7.94	11.77	✓	14.34	0.95	2.91	✗	▦	✓	0.05	✓	4	1-Low	Medium Risk
percentile rank			75	52	68	38												
# of funds in category			485	433	409	314										06-30-2026	02-15-2022	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
Vanguard Morn Small Cap Value Index Adm	VSIAX	Small Value	27.00	16.08	9.22	10.99	✓	16.43	0.82	1.36	✗	▦	✓	0.07	✓	5	1-Low	Medium Risk
percentile rank			74	47	40	34												
# 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	VEMAX	Diversified Emerging Mkts	24.01	17.05	5.05	8.43	✓	12.42	0.65	17.85	✓	▦	✓	0.13	✓	2	1-Low	Medium Risk
percentile rank			83	80	74	74												
# 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	RIGGX	Foreign Large Blend	24.94	18.16	9.09	10.12	✓	12.33	0.86	17.76	✓	▦	✓	0.53	✓	2	1-Low	Low Risk
percentile rank			29	32	37	30												
# 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
Alternative																		
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	12.49	9.14	2.81	4.92	✓	16.72	1.00	1.36	✗	—	✓	0.13	✓	3	1-Low	Low Risk
percentile rank			71	57	68	65												
# of funds in category			248	239	231	185										06-30-2026	02-15-2022	12-31-2022
Fixed Income																		
Baird Core Plus Bond Inst	BCOIX	Core Plus Bond	4.09	4.99	0.68	2.34	✓	5.44	0.98	25.77	✓	—	—	0.30	✓	4	1-Low	-
percentile rank			49	36	34	31												
# of funds in category			624	585	548	434										06-30-2026	02-15-2022	-

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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 Updated	Commit. Level Updated	Carbon Risk Updated
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	3.42	3.94	0.93	2.46	✓	4.22	1.00	0.21	✗	—	—	0.10	✓	3	-	-
percentile rank			26	39	44	44												
# of funds in category			176	169	162	137										06-30-2026	-	-
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	-
Lincoln Stable Value Account -J97D		Stable Value	-	-	-	-	—	-	-	43.19	✓	—	—	-	—	-	-	-
percentile rank			-	-	-	-												
# of funds in category			82	-	-	-										-	-	-
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	4.63	5.14	3.63	2.50	✓	0.63	0.10	28.99	✓	—	—	0.24	✓	-	-	-
percentile rank			14	53	50	70												
# of funds in category			254	231	189	123										-	-	-
Target Date																		
Vanguard Target Retirement 2020 Fund	VTWNX	Target Date	10.65	10.04	4.64	6.99	✓	6.60	0.83	13.36	✓	—	✓	0.08	✓	4	1-Low	-
percentile rank			81	72	72	51												
# of funds in category			145	139	121	84										06-30-2026	02-15-2022	-
Vanguard Target Retirement 2025 Fund	VTTVX	Target Date	13.63	12.13	5.84	8.17	✓	7.91	0.91	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			39	20	19	21												
# of funds in category			176	169	150	102										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2030 Fund	VTHRX	Target Date	15.90	13.62	6.78	9.11	✓	8.94	0.95	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			23	13	16	18												
# of funds in category			270	261	241	171										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2035 Fund	VTTHX	Target Date	17.63	14.83	7.61	9.98	✓	9.58	0.93	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			33	20	21	31												
# of funds in category			265	257	237	168										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2040 Fund	VFORX	Target Date	19.33	16.04	8.42	10.83	✓	10.21	0.92	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			46	38	37	31												
# of funds in category			270	259	239	171										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2045 Fund	VTIVX	Target Date	21.03	17.17	9.20	11.54	✓	10.85	0.92	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			46	40	40	28												
# of funds in category			264	257	237	168										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2050 Fund	VFIFX	Target Date	22.70	18.26	9.89	11.91	✓	11.44	0.93	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			41	29	26	21												
# of funds in category			269	259	239	171										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2055 Fund	VFFVX	Target Date	22.84	18.30	9.91	11.92	✓	11.48	0.92	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			49	35	38	28												
# of funds in category			263	256	236	168										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2060 Fund	VTTSX	Target Date	22.82	18.29	9.91	11.92	✓	11.47	1.19	13.36	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			57	39	39	40												
# of funds in category			262	255	235	127										06-30-2026	02-15-2022	12-31-2022
Vanguard Target Retirement 2065 Fund	VLXVX	Target Date	22.82	18.29	9.92	-	✓	11.47	1.19	8.97	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			57	42	44	-												
# of funds in category			249	236	188	-										06-30-2026	02-15-2022	12-31-2022

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Vanguard Target Retirement 2070 Fund	VSVNX	Target Date	22.81	18.29	–	–	✓	11.46	0.92	4.01	✓	—	✓	0.08	✓	3	–	Low Risk
percentile rank			65	1	–	–												
# of funds in category			145	23	–	–										06-30-2026	–	12-31-2022
Vanguard Target Retirement Income Fund	VTINX	Target Date	9.72	9.11	4.06	5.35	✓	5.98	0.93	13.36	✓	—	✓	0.08	✓	4	1-Low	–
percentile rank			63	52	47	48												
# of funds in category			201	197	181	122										06-30-2026	02-15-2022	–
Balanced																		
American Funds Capital Inc Bldr R-6	RIRGX	Global Allocation	16.10	14.99	9.05	8.25	✗	8.76	0.75	34.52	✓	▦	✓	0.26	✓	2	–	Medium Risk
percentile rank			82	58	14	87												
# of funds in category			199	195	191	160										06-30-2026	–	12-31-2022

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