

KYMERIA INDEPENDENT PHYSICIANS 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																		
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
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
Vanguard Morn Growth Index Admiral percentile rank	VIGAX	Large Growth	18.59 42	22.91 36	13.17 29	18.00 23	✔	17.42	1.06	1.36	✖	📊	✔	0.05	✔	4	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 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 Selected Value Inv percentile rank	VASVX	Mid-Cap Value	20.45 55	14.42 49	10.41 33	11.52 29	✔	15.62	1.00	21.36	✔	📊	✔	0.34	✔	4	-	Medium Risk
# of funds in category			467	439	418	347										06-30-2026	-	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
American Funds Intl Gr and Inc R-6 percentile rank	RIGGX	Foreign Large Blend	24.94 29	18.16 32	9.09 37	10.12 30	✔	12.33	0.86	17.76	✔	📊	✔	0.53	✔	2	1-Low	Low Risk
# of funds in category			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 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
DFA Global Equity I percentile rank	DGEIX	Global Stock	24.75 24	19.10 33	11.31 20	12.94 18	✔	12.42	0.95	14.35	✔	—	✔	0.25	✔	1	-	Medium Risk
# of funds in category			347	316	310	229										06-30-2026	-	12-31-2022

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			Trailing Performance and Risk							Management		Style		Expense			ESG Metrics		
Name	Ticker	Asset Class	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	
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 06-30-2026	— -	— -	
⚠ Neuberger Real Estate R6 percentile rank # of funds in category	NRREX	Real Estate	11.52 85 248	8.55 73 239	2.38 84 231	6.01 26 185	✔ 	16.95 	1.01 	20.51 	✔ 	— 	✔ 	0.75 	✔ 	3 06-30-2026	— -	Low Risk 12-31-2022	
Fixed Income																			
PIMCO International Bond (USD-Hdg) Instl percentile rank # of funds in category	PFORX	Global Bond	2.93 67 132	5.57 20 126	1.81 13 123	2.81 15 86	✔ 	3.72 	0.53 	11.77 	✔ 	— 	— 	0.57 	✔ 	3 06-30-2026	— -	— -	
Vanguard High-Yield Corporate Adm percentile rank # of funds in category	VWEAX	High Yield Bond	5.72 45 654	8.18 53 628	4.05 38 591	5.26 40 483	✔ 	3.99 	0.91 	3.84 	✔ 	— 	— 	0.12 	✔ 	1 04-30-2026	— -	— -	
Vanguard Inflation-Protected Secs Adm percentile rank # of funds in category	VAIPX	Inflation- Protected Bond	3.42 26 176	3.94 39 169	0.93 44 162	2.46 44 137	✔ 	4.22 	1.00 	0.21 	✖ 	— 	— 	0.10 	✔ 	3 06-30-2026	— -	— -	
BNY Mellon Bond Market Index I percentile rank # of funds in category	DBIRX	Intermediate- Term Bond	3.56 65 545	3.99 74 509	-0.12 70 471	1.37 73 351	✔ 	5.48 	0.99 	1.00 	✖ 	☐ 	— 	0.15 	✔ 	3 06-30-2026	— -	— -	
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 09-30-2025	1-Low 02-15-2022	— -	
Lincoln Stable Value Account -LNGPA percentile rank # of funds in category		Stable Value	— — 82	— — -	— — -	— — -	— 	— 	— 	43.19 	✔ 	— 	— 	— 	— 	— -	— -	— -	
Vanguard Ultra-Short-Term Bond Admiral percentile rank # of funds in category	VUSFX	Ultrashort Bond	4.20 43 254	5.28 40 231	3.45 74 189	2.68 49 123	✔ 	0.67 	0.09 	6.62 	✔ 	— 	— 	0.09 	✔ 	3 06-30-2026	— -	— -	
Balanced																			
Vanguard LifeStrategy 20/80 Inv percentile rank # of funds in category	VASIX	Target Risk	7.53 72 93	7.29 67 90	2.36 83 86	3.88 66 74	✔ 	5.84 	0.92 	4.35 	✔ 	☐ 	✔ 	0.10 	✔ 	3 06-30-2026	1-Low 07-19-2023	— -	
Vanguard LifeStrategy 40/60 Inv percentile rank # of funds in category	VSCGX	Target Risk	11.74 52 247	10.41 26 240	4.53 34 233	6.22 25 191	✔ 	7.25 	0.95 	4.35 	✔ 	☐ 	✔ 	0.10 	✔ 	3 06-30-2026	1-Low 07-19-2023	— -	
Vanguard LifeStrategy 60/40 Inv Shrs percentile rank # of funds in category	VSMGX	Target Risk	16.08 53 448	13.52 32 441	6.65 37 427	8.49 21 353	✔ 	8.89 	0.94 	4.35 	✔ 	☐ 	✔ 	0.10 	✔ 	3 06-30-2026	1-Low 07-19-2023	Low Risk 12-31-2022	

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																	Updated	Updated	Updated
Vanguard LifeStrategy 80/20 Inv Shrs	VASGX	Target Risk	20.50	16.67	8.78	10.76	🟢	10.61	0.96	4.35	🟢	📊	🟢	0.10	🟢	3	1-Low	Low Risk	
percentile rank			27	16	23	13													
# of funds in category			199	195	191	160										06-30-2026	07-19-2023	12-31-2022	