

MURRAY EQUIPMENT INC 401K SALARY

Screens Summary (Data as of 06-30-2026)

⊖ Fund Removed from Approved List ⚠ Fund on Watch List

			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
US Stock																		
JPMorgan US Equity R6 percentile rank # of funds in category	JUEMX	Large Blend	14.19 82 1,444	17.54 68 1,334	11.77 57 1,245	15.46 18 988	🟢	13.78	1.04	11.87	🟢	🇺🇸	🔴	0.44	🟢	3 06-30-2026	2-Basic 03-11-2022	Low Risk 12-31-2022
Fidelity 500 Index percentile rank # of funds in category	FXAIX	Large Blend Index	22.31 34 1,444	20.60 25 1,334	13.39 19 1,245	15.49 17 988	🟢	13.05	1.00	17.42	🟢	🇺🇸	🟢	0.02	🟢	3 06-30-2026	1-Low 07-19-2023	Low Risk 12-31-2022
State St Russell Lg Cap Gr® Idx NL Cl C percentile rank # of funds in category		Large Growth	17.65 48 1,189	22.55 39 1,108	13.68 24 1,057	18.53 17 865	🟢	16.45	1.00	27.01	🟢	🇺🇸	🟢	0.04	🟢	3 06-30-2026	- -	Low Risk 12-31-2022
Vanguard Morn Value Index Admiral percentile rank # of funds in category	VVIAX	Large Value	25.91 24 1,214	18.00 28 1,161	12.30 18 1,097	12.66 23 928	🟢	11.56	0.90	1.36	🔴	🇺🇸	🟢	0.05	🟢	3 06-30-2026	1-Low 02-15-2022	Medium Risk 12-31-2022
Vanguard Morn Mid Cap Growth Index Adm percentile rank # of funds in category	VMGMX	Mid-Cap Growth	8.50 65 573	15.00 48 553	6.06 32 535	12.44 38 460	🟢	17.34	0.94	2.91	🔴	🇺🇸	🟢	0.07	🟢	4 06-30-2026	1-Low 02-15-2022	Medium Risk 12-31-2022
Vanguard Selected Value Inv percentile rank # of funds in category	VASVX	Mid-Cap Value	20.45 55 467	14.42 49 439	10.41 33 418	11.52 29 347	🟢	15.62	1.00	21.36	🟢	🇺🇸	🟢	0.34	🟢	4 06-30-2026	- -	Medium Risk 12-31-2022
Allspring Small Company Growth R6 percentile rank # of funds in category	WSCRX	Small Growth	26.99 71 641	12.87 73 627	4.81 51 601	11.57 63 491	🟢	18.41	0.82	31.65	🟢	🇺🇸	🟢	0.86	🟢	3 06-30-2026	- -	Low Risk 12-31-2022
Vanguard Morn Small Cap Growth Idx Adm percentile rank # of funds in category	VSGAX	Small Growth	32.73 52 641	17.46 36 627	5.37 45 601	12.15 45 491	🟢	19.18	0.88	1.36	🔴	🇺🇸	🟢	0.07	🟢	4 06-30-2026	1-Low 02-15-2022	Medium Risk 12-31-2022
DFA US Small Cap Value I percentile rank # of funds in category	DFS VX	Small Value	33.18 48 557	17.06 35 534	11.43 12 512	11.93 16 430	🟢	18.50	0.93	14.35	🟢	🇺🇸	🟢	0.31	🟢	3 06-30-2026	- -	Medium Risk 12-31-2022
Non-US Stock																		
American Funds New World R-6 percentile rank # of funds in category	RNWXG	Diversified Emerging Mkts	29.73 77 805	18.51 72 769	6.82 55 707	11.36 12 535	🟢	13.67	0.72	27.05	🟢	🇺🇸	🟢	0.57	🟢	4 06-30-2026	1-Low 02-15-2022	Medium Risk 12-31-2022
Vanguard Developed Markets Index Admiral percentile rank # of funds in category	VTMGX	Foreign Large Blend Index	28.62 11 820	19.26 19 784	10.10 17 738	10.50 20 583	🟢	13.86	0.97	13.36	🟢	🇺🇸	🟢	0.05	🟢	2 06-30-2026	1-Low 02-15-2022	Low Risk 12-31-2022
MFS International Equity R6 percentile rank # of funds in category	MIEIX	Foreign Large Growth	8.40 97 820	11.39 96 784	7.44 69 738	10.13 30 583	🟢	12.09	0.79	10.17	🟢	🇺🇸	🟢	0.64	🟢	4 06-30-2026	2-Basic 02-15-2022	Low Risk 12-31-2022
Schwab Fundamental Intl Equity Index Fd percentile rank # of funds in category	SFNNX	Foreign Large Value	36.20 11 400	21.81 28 376	13.37 23 364	11.74 14 289	🟢	13.37	0.94	9.18	🟢	🇺🇸	🟢	0.25	🟢	1 06-30-2026	- -	Medium Risk 12-31-2022

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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	
Vanguard Total World Stock Index Admiral percentile rank	VTWAX	Global Stock	24.25	19.66	10.86	-	✓	12.39	0.97	13.36	✓	—	✓	0.09	✓	2	1-Low	Low Risk	
# of funds in category			347	316	310	229										06-30-2026	02-15-2022	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

PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	2.93	5.57	1.81	2.81	✓	3.72	0.53	11.77	✓	—	—	0.57	✓	3	-	-
percentile rank			67	20	13	15												
# of funds in category			132	126	123	86										06-30-2026	-	-
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	5.72	8.18	4.05	5.26	✓	3.99	0.91	3.84	✓	—	—	0.12	✓	1	-	-
percentile rank			45	53	38	40												
# of funds in category			654	628	591	483										04-30-2026	-	-
DFA Inflation-Protected Securities I	DIPSX	Inflation- Protected Bond	3.18	4.03	0.96	2.56	✓	4.35	1.03	19.79	✓	—	—	0.11	✓	3	-	-
percentile rank			65	32	35	30												
# 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	-
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	-	-
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	-

Balanced

American Funds American Balanced R-6	RLBGX	Moderate Allocation	21.02	17.32	10.06	10.67	✓	9.32	1.03	27.51	✓	—	✓	0.25	✓	3	1-Low	Low Risk
percentile rank			7	3	1	7												
# of funds in category			535	512	494	423										06-30-2026	02-15-2022	12-31-2022