

SAN JUAN REGIONAL MEDICAL CENTER

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																		
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
American Funds Growth Fd of Amer R-6 percentile rank	RGAGX	Large Growth	19.24 39	23.79 29	11.84 40	16.53 46	✔	15.94	0.93	24.68	✔	🗲	✔	0.29	✔	2	1-Low	Low Risk
# of funds in category			1,189	1,108	1,057	865										06-30-2026	04-07-2022	12-31-2022
Vanguard Morn Value Index Admiral percentile rank	VVIAX	Large Value	25.91 24	18.00 28	12.30 18	12.66 23	✔	11.56	0.90	1.36	✖	🗲	✔	0.05	✔	3	1-Low	Medium 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 Morn Mid Cap Value Index Adm percentile rank	VMVAX	Mid-Cap Value	22.61 44	15.14 43	9.45 48	10.76 46	✔	13.40	0.89	2.91	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk
# of funds in category			467	439	418	347										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
American Funds EUPAC R-6 percentile rank	RERGX	Foreign Large Growth	23.72 15	16.01 26	5.51 39	9.91 30	✔	13.84	0.97	25.10	✔	🗲	✔	0.47	✔	2	1-Low	Medium Risk
# of funds in category			423	399	382	265										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
American Funds New Perspective R-6 percentile rank	RNPGX	Global Stock	15.81 43	17.62 36	8.65 31	14.01 23	✔	12.90	1.00	25.59	✔	—	✔	0.40	✔	3	2-Basic	Low Risk
# of funds in category			316	304	290	214										06-30-2026	02-15-2022	12-31-2022

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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	Commit. Level	Carbon Risk
																Updated	Updated	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	-	-
Vanguard Real Estate Index Admiral percentile rank # of funds in category	VGSLX	Real Estate	12.49 71 248	9.14 57 239	2.81 68 231	4.92 65 185	🟢	16.72	1.00	1.36	🔴	—	🟢	0.13	🟢	3	1-Low	Low Risk
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	-	-
BlackRock High Yield K percentile rank # of funds in category	BRHYX	High Yield Bond	6.57 18 654	9.29 12 628	4.69 15 591	6.15 8 483	🟢	4.17	0.96	16.51	🟢	—	—	0.47	🟢	-	2-Basic	-
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	-	-
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 Stable Value Account -LNGPA percentile rank # of funds in category		Stable Value	- - 82	- - -	- - -	- - -	—	-	-	43.19	🟢	—	—	-	—	-	-	-
PIMCO Short-Term Instl percentile rank # of funds in category	PTSHX	Ultrashort Bond	5.03 6 254	5.65 19 231	3.85 23 189	3.09 11 123	🟢	0.49	-0.03	15.50	🟢	—	—	0.49	🔴	3	-	-
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	VTVX	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

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																Updated	Updated	Updated
Vanguard Target Retirement 2035 Fund	VTHX	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	VTSX	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
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 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