

# JOHNSON MEMORIAL HOSPITAL DEFINED

## Screens Summary (Data as of 09-30-2020)

⊖ Fund Removed from Approved List    ⚠ Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management			Style		Expense				
			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	
<b>US Stock</b>																
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	15.11	12.24	14.11	13.71	✔	17.74	1.00	4.43	✔	☐	✔	0.04	✔	
<i>percentile rank</i>			26	19	12	10										
<i># of funds in category</i>			1,379	1,239	1,075	828										
Vanguard Growth Index Admiral	VIGAX	Large Growth	38.24	21.02	19.24	16.73	✔	19.17	1.00	25.77	✔	☐	✔	0.05	✔	
<i>percentile rank</i>			25	31	29	24										
<i># of funds in category</i>			1,331	1,241	1,107	821										
Vanguard Value Index Adm	VVIAX	Large Value	-3.32	4.37	9.25	10.80	✔	17.45	0.95	25.77	✔	☐	✔	0.05	✔	
<i>percentile rank</i>			40	30	20	14										
<i># of funds in category</i>			1,209	1,133	996	718										
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	7.08	7.98	10.33	11.97	✔	20.37	0.98	22.38	✔	☐	✔	0.05	✔	
<i>percentile rank</i>			11	11	13	7										
<i># of funds in category</i>			403	368	295	213										
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	18.68	12.85	13.69	—	✔	22.68	0.97	15.76	✔	☐	✖	0.07	✔	
<i>percentile rank</i>			46	39	42	—										
<i># of funds in category</i>			626	581	515	388										
Vanguard Small Cap Value Index Admiral	VSIAX	Small Value	-12.30	-2.67	4.80	—	✔	23.45	0.99	4.43	✔	☐	✖	0.07	✔	
<i>percentile rank</i>			25	15	16	—										
<i># of funds in category</i>			416	387	356	254										
<b>Non-US Stock</b>																
Vanguard Emerging Mkts Stock Idx Adm	VEMAX	Diversified Emerging Mkts	9.75	2.50	8.20	2.26	✔	18.98	0.99	12.10	✔	☐	✔	0.14	✔	
<i>percentile rank</i>			47	39	45	52										
<i># of funds in category</i>			790	695	590	265										
American Funds Europacific Growth R6	REGGX	Foreign Large Blend	14.97	5.67	9.08	6.79	✔	17.32	1.09	19.35	✔	☐	✔	0.46	✔	
<i>percentile rank</i>			58	60	50	52										
<i># of funds in category</i>			469	420	336	246										
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	2.18	0.94	5.79	4.96	✔	16.43	1.00	7.61	✔	☐	✔	0.07	✔	
<i>percentile rank</i>			44	45	35	26										
<i># of funds in category</i>			761	651	551	368										
<b>Alternative</b>																
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	-12.19	2.37	5.22	8.50	✔	18.00	0.94	24.40	✔	—	✔	0.12	✔	
<i>percentile rank</i>			33	44	31	38										
<i># of funds in category</i>			252	224	197	141										
<b>Fixed Income</b>																
Baird Core Plus Bond Inst	BCOIX	Core Plus Bond	7.82	5.71	5.01	4.58	✔	4.09	1.07	20.02	✔	—	—	0.30	✔	
<i>percentile rank</i>			21	14	16	16										
<i># of funds in category</i>			604	537	459	341										

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Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation-Protected Bond	9.80 34 210	5.63 34 200	4.46 31 172	3.46 20 116		3.59	0.94	9.12		—	—	0.10	
Vanguard Total Bond Market Index Adm <i>percentile rank</i> <i># of funds in category</i>	VBTLX	Intermediate-Term Bond	7.03 38 418	5.30 25 381	4.20 33 336	3.59 47 256		3.44	1.02	7.61			—	0.05	
Federated Hermes Govt Ultrashort R6 <i>percentile rank</i> <i># of funds in category</i>	FGULX	Ultrashort Bond	1.79 49 209	1.90 64 168	— — 133	— — 64		0.46	0.06	23.24		—	—	0.24	

### Target Date

Vanguard Target Retirement 2015 Inv <i>percentile rank</i> <i># of funds in category</i>	VTXVX	Target Date	7.68 62 120	6.09 35 93	7.04 51 68	7.04 32 46		6.94	0.86	7.61		—		0.13	
Vanguard Target Retirement 2020 Inv <i>percentile rank</i> <i># of funds in category</i>	VTWNX	Target Date	8.51 34 199	6.54 20 170	7.96 18 130	7.81 10 86		9.14	1.02	7.61		—		0.13	
Vanguard Target Retirement 2025 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTVX	Target Date	9.04 38 218	6.89 23 186	8.60 18 146	8.38 12 89		10.72	1.05	7.61		—		0.13	
Vanguard Target Retirement 2030 Inv <i>percentile rank</i> <i># of funds in category</i>	VTHRX	Target Date	9.38 34 228	7.04 25 194	9.07 29 153	8.84 19 91		11.99	1.02	7.61		—		0.14	
Vanguard Target Retirement 2035 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTX	Target Date	9.71 33 211	7.16 25 183	9.53 29 143	9.29 16 86		13.26	0.98	7.61		—		0.14	
Vanguard Target Retirement 2040 Inv <i>percentile rank</i> <i># of funds in category</i>	VFORX	Target Date	9.96 32 222	7.27 22 194	9.97 27 153	9.58 16 91		14.53	0.97	7.61		—		0.14	
Vanguard Target Retirement 2045 Inv <i>percentile rank</i> <i># of funds in category</i>	VTIVX	Target Date	10.27 34 211	7.32 23 183	10.13 23 143	9.66 16 85		15.64	0.98	7.61		—		0.15	
Vanguard Target Retirement 2050 Inv <i>percentile rank</i> <i># of funds in category</i>	VFIX	Target Date	10.26 35 222	7.32 25 194	10.13 27 153	9.65 22 79		15.65	0.97	7.61		—		0.15	
Vanguard Target Retirement 2055 Inv <i>percentile rank</i> <i># of funds in category</i>	VFFVX	Target Date	10.25 36 211	7.31 27 183	10.12 32 140	9.68 26 35		15.63	0.96	7.61		—		0.15	
Vanguard Target Retirement 2060 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTX	Target Date	10.25 38 242	7.31 29 171	10.12 48 71	— — —		15.63	0.96	7.61		—		0.15	
Vanguard Target Retirement 2065 Inv <i>percentile rank</i> <i># of funds in category</i>	VLXVX	Target Date	10.11 41 242	7.25 34 171	— — 71	— — —		15.64	0.96	3.22		—		0.15	

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Vanguard Target Retirement Income Inv	VTINX	Target Date	7.35	5.79	6.03	5.60	✓	5.73	0.86	7.61	✓	—	✓	0.12	✓
<i>percentile rank</i>			<i>28</i>	<i>17</i>	<i>29</i>	<i>17</i>									
<i># of funds in category</i>			<i>177</i>	<i>151</i>	<i>128</i>	<i>90</i>									
<b>Balanced</b>															
American Funds Capital Income Bldr R6	RIRGX	World Allocation	-0.24	2.09	5.53	6.26	✓	10.23	0.92	28.77	✓	☒	✓	0.27	✓
<i>percentile rank</i>			<i>56</i>	<i>53</i>	<i>49</i>	<i>24</i>									
<i># of funds in category</i>			<i>477</i>	<i>406</i>	<i>349</i>	<i>219</i>									