

CONNECTICUT PEDIATRIC PARTNERSHIP

Screens Summary (Data as of 09-30-2021)

- 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	Sustain. Rating	Commit. Level	Carbon Risk		
																	Updated	Updated	Updated
American Century Inflation Adjs Bond R5	AIANX	Inflation-Protected Bond	6.03	7.14	4.12	2.86	✓	4.41	1.07	19.85	✓	—	—	0.27	✓	—	—	—	
<i>percentile rank</i>			15	38	43	40													
<i># of funds in category</i>			206	202	176	125													
Vanguard Total Bond Market Index Adm	VBTLX	Intermediate-Term Bond	-0.92	5.41	2.93	2.96	✓	3.71	1.05	8.61	✓	☒	—	0.05	✓	—	1-Low	—	
<i>percentile rank</i>			69	42	52	59													
<i># of funds in category</i>			411	378	333	249										10-08-2021	—		
PIMCO Short-Term I2	PTSPX	Ultrashort Bond	0.62	1.72	2.02	1.82	✓	2.37	0.11	10.75	✓	—	—	0.57	✘	—	—	—	
<i>percentile rank</i>			39	46	17	16													
<i># of funds in category</i>			241	213	169	88													

Target Date																		
Vanguard Target Retirement 2015 Inv	VTVX	Target Date	9.49	7.74	7.13	7.87	✓	7.38	0.83	8.61	✓	—	✓	0.12	✓	—	1-Low	—
<i>percentile rank</i>			100	83	80	66												
<i># of funds in category</i>			117	111	77	45										10-08-2021	—	
Vanguard Target Retirement 2020 Inv	VTWNX	Target Date	13.37	9.00	8.60	9.11	✓	9.77	0.98	8.61	✓	—	✓	0.13	✓	—	1-Low	—
<i>percentile rank</i>			57	45	33	31												
<i># of funds in category</i>			175	162	123	67										10-08-2021	—	
Vanguard Target Retirement 2025 Inv	VTTVX	Target Date	15.93	9.86	9.61	10.00	✓	11.51	1.03	8.61	✓	—	✓	0.13	✓	3	1-Low	Low Risk
<i>percentile rank</i>			48	35	28	20												
<i># of funds in category</i>			224	206	165	91										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2030 Inv	VTHRX	Target Date	18.29	10.45	10.44	10.78	✓	12.87	1.00	8.61	✓	—	✓	0.14	✓	3	1-Low	Low Risk
<i>percentile rank</i>			54	39	39	25												
<i># of funds in category</i>			225	205	165	87										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2035 Inv	VTTX	Target Date	20.60	11.01	11.24	11.54	✓	14.23	0.96	8.61	✓	—	✓	0.14	✓	3	1-Low	Low Risk
<i>percentile rank</i>			70	43	41	30												
<i># of funds in category</i>			217	203	162	88										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2040 Inv	VFORX	Target Date	23.00	11.55	12.03	12.08	✓	15.60	0.95	8.61	✓	—	✓	0.14	✓	3	1-Low	Low Risk
<i>percentile rank</i>			74	48	37	31												
<i># of funds in category</i>			219	205	165	87										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2045 Inv	VTIVX	Target Date	25.42	12.17	12.62	12.38	✓	16.85	0.97	8.61	✓	—	✓	0.15	✓	3	1-Low	Low Risk
<i>percentile rank</i>			63	40	34	23												
<i># of funds in category</i>			217	203	162	87										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2050 Inv	VVFX	Target Date	25.65	12.24	12.66	12.40	✓	16.87	0.95	8.61	✓	—	✓	0.15	✓	3	1-Low	Low Risk
<i>percentile rank</i>			77	41	41	32												
<i># of funds in category</i>			219	205	165	79										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2055 Inv	VFFVX	Target Date	25.61	12.24	12.65	12.39	✓	16.87	0.95	8.61	✓	—	✓	0.15	✓	3	1-Low	Low Risk
<i>percentile rank</i>			80	42	48	37												
<i># of funds in category</i>			217	203	159	66										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2060 Inv	VTTSX	Target Date	25.60	12.23	12.64	—	✓	16.86	1.46	8.61	✓	—	✓	0.15	✓	3	1-Low	Low Risk
<i>percentile rank</i>			81	49	59	—												
<i># of funds in category</i>			211	188	125	—										08-31-2021	10-08-2021	06-30-2021
Vanguard Target Retirement 2065 Inv	VLVX	Target Date	25.59	12.18	—	—	✘	16.88	1.46	4.22	✓	—	✓	0.15	✓	3	1-Low	Low Risk
<i>percentile rank</i>			83	64	—	—												
<i># of funds in category</i>			120	17	—	—										08-31-2021	10-08-2021	06-30-2021

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Vanguard Target Retirement Income Inv	VTINX	Target Date	8.48	7.53	6.22	6.08	✓	6.25	0.84	8.61	✓	—	✓	0.12	✓	—	1-Low	—	
<i>percentile rank</i>			<i>60</i>	<i>34</i>	<i>43</i>	<i>38</i>													
<i># of funds in category</i>			<i>169</i>	<i>152</i>	<i>122</i>	<i>79</i>											10-08-2021	—	

Balanced																			
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	Target Risk	10.28	8.47	7.31	7.33	✓	7.95	1.01	27.02	✓	—	✓	0.12	✓	—	1-Low	—	
<i>percentile rank</i>			<i>83</i>	<i>33</i>	<i>36</i>	<i>34</i>													
<i># of funds in category</i>			<i>516</i>	<i>481</i>	<i>429</i>	<i>276</i>											10-08-2021	—	
Vanguard LifeStrategy Growth Inv	VASGX	Target Risk	22.47	11.54	11.60	11.42	✓	15.04	1.02	27.02	✓	—	✓	0.14	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			<i>66</i>	<i>24</i>	<i>25</i>	<i>26</i>													
<i># of funds in category</i>			<i>312</i>	<i>289</i>	<i>263</i>	<i>189</i>											08-31-2021	10-08-2021	06-30-2021
Vanguard LifeStrategy Income Inv	VASIX	Target Risk	4.52	6.73	5.06	5.17	✓	4.87	0.96	27.02	✓	—	✓	0.11	✓	—	1-Low	—	
<i>percentile rank</i>			<i>82</i>	<i>29</i>	<i>50</i>	<i>51</i>													
<i># of funds in category</i>			<i>196</i>	<i>180</i>	<i>165</i>	<i>108</i>											10-08-2021	—	
Vanguard LifeStrategy Moderate Gr Inv	VSMGX	Target Risk	16.25	10.04	9.47	9.39	✓	11.44	0.99	27.02	✓	—	✓	0.13	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			<i>82</i>	<i>46</i>	<i>53</i>	<i>56</i>													
<i># of funds in category</i>			<i>690</i>	<i>654</i>	<i>597</i>	<i>428</i>											08-31-2021	10-08-2021	06-30-2021