

CAMPAIGN LEGAL CENTER INC 401K

Screens Summary (Data as of 09-30-2022)

🚫 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 <i>Updated</i>	Commit. Level <i>Updated</i>	Carbon Risk <i>Updated</i>
US Stock																		
Vanguard Dividend Growth Inv	VDIGX	Large Blend	-6.18	7.15	10.27	11.53	✓	17.00	0.79	16.67	✓	🇺🇸	✓	0.27	✓	3	2-Basic	Low Risk
<i>percentile rank</i>			3	55	5	19												
<i># of funds in category</i>			1,376	1,250	1,131	828									08-31-2022	02-15-2022	06-30-2022	
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	-15.51	8.12	9.20	11.66	✓	20.30	1.00	6.43	✓	🇺🇸	✓	0.04	✓	3	1-Low	Low Risk
<i>percentile rank</i>			42	23	20	13												
<i># of funds in category</i>			1,376	1,250	1,131	828									08-31-2022	02-15-2022	06-30-2022	
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	-19.48	5.47	6.64	10.45	✓	22.73	0.98	24.38	✓	🇺🇸	✓	0.05	✓	4	1-Low	Medium Risk
<i>percentile rank</i>			81	49	26	15												
<i># of funds in category</i>			412	368	336	219									08-31-2022	02-15-2022	06-30-2022	
DFA US Small Cap I	DFSTX	Small Blend	-15.66	7.34	4.59	9.42	✓	24.60	0.94	10.59	✓	🇺🇸	✓	0.27	✓	3	–	Medium Risk
<i>percentile rank</i>			21	13	35	21												
<i># of funds in category</i>			610	581	539	358									08-31-2022	–	06-30-2022	
Non-US Stock																		
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	-25.44	-1.79	-0.46	3.31	✓	20.07	1.07	14.01	✓	🇺🇸	✓	0.54	✓	2	1-Low	Low Risk
<i>percentile rank</i>			47	49	31	49												
<i># of funds in category</i>			755	706	617	425									08-31-2022	02-15-2022	06-30-2022	
Fixed Income																		
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	-11.53	0.69	1.84	0.89	✓	6.68	0.97	0.89	✖	—	—	0.10	✓	3	–	–
<i>percentile rank</i>			47	51	49	38												
<i># of funds in category</i>			210	199	190	128									08-31-2022	–	–	
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	-15.26	-3.07	-0.09	1.36	✓	5.71	1.04	22.02	✓	🇺🇸	—	0.30	✓	3	1-Low	–
<i>percentile rank</i>			64	33	24	10												
<i># of funds in category</i>			448	404	366	272									08-31-2022	02-15-2022	–	
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	-0.38	0.50	1.08	–	✓	0.56	0.07	25.24	✓	—	—	0.24	✓	–	–	–
<i>percentile rank</i>			30	46	61	–												
<i># of funds in category</i>			237	216	178	99									–	–	–	
Balanced																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	-13.13	3.72	5.14	7.89	✓	12.60	0.94	23.76	✓	—	✓	0.25	✓	3	1-Low	Low Risk
<i>percentile rank</i>			27	25	22	6												
<i># of funds in category</i>			766	708	658	487									08-31-2022	02-15-2022	06-30-2022	