

MURRAY EQUIPMENT INC 401K SALARY

Screens Summary (Data as of 09-30-2024)

🔴 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	
US Stock																		
JPMorgan US Equity R6	JUEMX	Large Blend	37.69	12.52	18.02	14.00	✔️	17.32	0.98	10.13	✔️	🇺🇸	✖️	0.44	✔️	3	2-Basic	Low Risk
percentile rank			11	13	2	2												
# of funds in category			1,497	1,348	1,236	919												
															08-31-2024	03-11-2022	12-31-2022	
Fidelity 500 Index	FXAIX	Large Blend Index	36.33	11.90	15.96	13.37	✔️	17.52	1.00	15.67	✔️	🇺🇸	✔️	0.02	✔️	3	1-Low	Low Risk
percentile rank			23	20	19	8												
# of funds in category			1,497	1,348	1,236	919												
															08-31-2024	07-19-2023	12-31-2022	
State St Russell Lg Cap Gr® Indx NL Cl C		Large Growth	42.21	11.99	19.70	16.47	✔️	20.85	1.00	25.27	✔️	🇺🇸	✔️	0.04	✔️	3	-	Low Risk
percentile rank			35	9	12	8												
# of funds in category			1,172	1,107	1,034	803												
															08-31-2024	-	12-31-2022	
Vanguard Value Index Adm	VVIAX	Large Value	29.78	11.64	12.25	10.78	✔️	15.69	0.93	29.77	✔️	🇺🇸	✔️	0.05	✔️	3	1-Low	Medium Risk
percentile rank			25	17	30	15												
# of funds in category			1,194	1,108	1,054	820												
															08-31-2024	02-15-2022	12-31-2022	
Vanguard Mid-Cap Growth Index Admiral	VMGMX	Mid-Cap Growth	26.00	1.70	11.19	10.58	✔️	21.51	1.00	1.62	✖️	🇺🇸	✔️	0.07	✔️	4	1-Low	Medium Risk
percentile rank			50	39	35	46												
# of funds in category			548	528	493	389												
															08-31-2024	02-15-2022	12-31-2022	
Vanguard Selected Value Inv	VASVX	Mid-Cap Value	28.03	11.65	13.26	9.55	✔️	20.56	1.02	19.61	✔️	🇺🇸	✔️	0.43	✔️	4	-	Medium Risk
percentile rank			30	9	18	25												
# of funds in category			406	388	374	285												
															08-31-2024	-	12-31-2022	
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	25.73	-0.95	8.60	9.18	✔️	22.39	0.95	19.76	✔️	🇺🇸	✔️	0.07	✔️	4	1-Low	Medium Risk
percentile rank			50	56	71	63												
# of funds in category			582	558	530	407												
															08-31-2024	02-15-2022	12-31-2022	
DFA US Small Cap Value I	DFS VX	Small Value	25.62	10.37	14.40	9.30	✔️	22.11	0.95	12.60	✔️	🇺🇸	✔️	0.31	✔️	2	-	Medium Risk
percentile rank			27	11	12	20												
# of funds in category			485	456	428	329												
															08-31-2024	-	12-31-2022	
Non-US Stock																		
American Funds New World R6	RNWGX	Diversified Emerging Mkts	24.64	1.39	8.37	6.92	✔️	15.99	0.80	25.31	✔️	🇺🇸	✔️	0.57	✔️	3	1-Low	Medium Risk
percentile rank			38	38	18	1												
# of funds in category			805	721	647	431												
															08-31-2024	02-15-2022	12-31-2022	
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	22.17	4.30	7.58	5.08	✔️	16.70	0.99	16.01	✔️	🇺🇸	✔️	0.54	✔️	3	1-Low	Low Risk
percentile rank			76	56	59	67												
# of funds in category			789	723	675	442												
															08-31-2024	02-15-2022	12-31-2022	
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	24.64	4.80	8.27	5.92	✔️	18.07	1.09	11.61	✔️	🇺🇸	✔️	0.08	✔️	2	1-Low	Low Risk
percentile rank			50	45	38	28												
# of funds in category			789	723	675	442												
															08-31-2024	02-15-2022	12-31-2022	
MFS International Equity R6	MIEIX	Foreign Large Growth	26.86	7.03	9.88	7.75	✔️	17.34	1.02	15.01	✔️	🇺🇸	✔️	0.68	✔️	4	2-Basic	Low Risk
percentile rank			14	8	8	5												
# of funds in category			789	723	675	442												
															08-31-2024	02-15-2022	12-31-2022	
Schwab Fundamental Intl Equity Index Fd	SFNNX	Foreign Large Value	21.87	7.92	9.61	6.01	✔️	17.35	0.98	7.44	✔️	🇺🇸	✔️	0.25	✔️	1	-	Medium Risk
percentile rank			59	39	21	11												
# of funds in category			365	340	314	213												
															08-31-2024	-	12-31-2022	

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Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	31.13	7.80	12.11	—	✔	16.84	1.02	11.61	✔	—	✔	0.10	✔	2	1-Low	Low Risk
<i>percentile rank</i>			31	42	31	—												
<i># of funds in category</i>			349	331	300	197										08-31-2024	02-15-2022	12-31-2022

Alternative																		
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	3.25	2.36	8.98	0.50	✔	17.12	1.09	5.92	✔	—	—	1.00	✔	2	—	—
<i>percentile rank</i>			22	90	43	53												
<i># of funds in category</i>			115	106	101	66										08-31-2024	—	—
DFA Real Estate Securities I	DFREX	Real Estate	35.13	3.54	5.18	8.07	✔	21.69	1.00	12.60	✔	—	✔	0.18	✔	3	—	Low Risk
<i>percentile rank</i>			18	35	37	21												
<i># of funds in category</i>			247	238	219	156										08-31-2024	—	12-31-2022

Fixed Income																		
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	10.77	0.93	1.37	3.15	✔	5.06	0.57	10.02	✔	—	—	0.75	✔	3	—	—
<i>percentile rank</i>			57	4	15	1												
<i># of funds in category</i>			107	105	97	60										03-31-2024	—	—
⚠ Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	14.46	2.94	4.00	4.74	✔	8.40	0.97	2.09	✖	—	—	0.12	✔	2	—	—
<i>percentile rank</i>			48	45	56	19												
<i># of funds in category</i>			670	614	579	435										08-31-2024	—	—
DFA Inflation-Protected Securities I	DIPSX	Inflation-Protected Bond	10.15	-0.68	2.63	2.59	✔	7.73	1.07	18.05	✔	—	—	0.11	✔	3	—	—
<i>percentile rank</i>			28	46	31	5												
<i># of funds in category</i>			161	153	145	107										08-31-2024	—	—
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	12.58	-1.10	0.78	2.25	✔	7.74	1.01	24.02	✔	⚠	—	0.30	✔	4	1-Low	—
<i>percentile rank</i>			13	27	27	13												
<i># of funds in category</i>			525	464	415	287										08-31-2024	02-15-2022	—
PIMCO Income Instl	PIMIX	Multisector Bond	12.73	2.43	3.61	4.36	✔	6.61	0.81	17.52	✔	—	—	0.83	✔	4	—	—
<i>percentile rank</i>			51	23	21	3												
<i># of funds in category</i>			363	331	282	195										08-31-2024	—	—
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	6.29	3.70	2.71	2.10	✔	0.89	0.05	10.76	✔	—	—	0.15	✔	3	1-Low	—
<i>percentile rank</i>			54	26	25	35												
<i># of funds in category</i>			252	204	185	114										08-31-2024	02-15-2022	—

Balanced																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	26.27	7.25	9.65	8.77	✔	12.13	0.98	25.76	✔	—	✔	0.25	✔	3	1-Low	Low Risk
<i>percentile rank</i>			14	9	17	10												
<i># of funds in category</i>			743	694	655	497										08-31-2024	02-15-2022	12-31-2022