

# JUNIPER HEALTH RETIREMENT PLAN

## Screens Summary (Data as of 09-30-2025)

- 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
<strong>US Stock</strong>															
American Funds Invmt Co of Amer R6	RICGX	Large Blend	20.86	28.54	17.69	14.84	✓	12.66	0.92	33.61	✓	■	✓	0.27	✓
percentile rank			8	4	7	27									
# of funds in category			1,395	1,286	1,185	902									
Fidelity 500 Index	FXAIX	Large Blend Index	17.59	24.92	16.45	15.29	✓	13.37	1.00	16.67	✓	■	✓	0.02	✓
percentile rank			23	22	19	9									
# of funds in category			1,395	1,286	1,185	902									
JPMorgan Large Cap Growth R6	JLGMX	Large Growth	22.70	29.77	15.88	19.64	✓	15.93	0.98	21.18	✓	■	✓	0.44	✓
percentile rank			40	44	28	7									
# of funds in category			1,093	1,047	975	779									
JPMorgan US Value R6	VGINX	Large Value	7.68	16.03	14.91	—	✓	13.52	0.94	6.64	✓	■	✓	0.44	✓
percentile rank			70	65	41	—									
# of funds in category			1,156	1,103	1,044	859									
MFS Mid Cap Growth R6	OTCKX	Mid-Cap Growth	10.99	17.78	7.53	12.61	✓	16.36	0.85	16.87	✓	■	✓	0.66	✓
percentile rank			50	42	54	25									
# of funds in category			507	490	458	381									
MFS Mid Cap Value R6	MVCKX	Mid-Cap Value	2.74	14.94	14.17	10.32	✓	16.08	0.94	16.87	✓	■	✓	0.62	✓
percentile rank			75	52	53	38									
# of funds in category			416	386	363	289									
Nationwide Geneva Small Cap Gr R6	NWKCX	Small Growth	-7.77	9.98	5.93	9.73	✓	18.70	0.82	16.31	✓	■	✓	0.83	✓
percentile rank			98	83	68	64									
# of funds in category			537	522	506	396									
Avantis® U.S. Small Cap Value Instl	AVUVX	Small Value	6.67	17.29	20.58	—	✓	22.57	1.02	5.83	✓	■	✓	0.25	✓
percentile rank			33	15	7	—									
# of funds in category			489	469	441	364									
<strong>Non-US Stock</strong>															
American Funds New World R6	RNWGX	Diversified Emerging Mkts	15.26	19.02	8.52	9.93	✓	12.80	0.73	26.31	✓	■	✓	0.57	✓
percentile rank			60	33	34	8									
# of funds in category			758	703	620	461									
! MFS Research International R6	MRSKX	Foreign Large Blend	8.19	17.04	7.59	7.72	✓	13.83	1.00	2.75	✗	■	✓	0.63	✓
percentile rank			92	92	90	61									
# of funds in category			757	703	660	491									
Fidelity International Index	FSPSX	Foreign Large Blend Index	15.60	22.34	11.38	8.34	✓	14.62	1.07	16.72	✓	■	✓	0.04	✓
percentile rank			55	24	26	38									
# of funds in category			757	703	660	491									
Vanguard International Growth Adm	VWILX	Foreign Large Growth	14.69	19.74	5.07	11.62	✓	19.07	1.24	15.77	✓	■	✓	0.25	✓
percentile rank			23	34	62	4									
# of funds in category			395	377	342	230									
DFA International Value I	DFIVX	Foreign Large Value	25.97	26.21	18.74	9.75	✓	14.26	0.98	15.60	✓	■	✓	0.28	✓
percentile rank			14	18	4	7									
# of funds in category			365	349	330	250									

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American Funds New Perspective R6	RNPGX	Global Stock	17.64	23.54	12.34	13.52	✓	13.55	1.06	24.85	✓	—	✓	0.41	✓
percentile rank			33	36	21	20									
# of funds in category			309	294	265	178									
<b>Alternative</b>															
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	11.25	4.42	12.44	5.05	✓	10.62	1.06	6.92	✓	—	—	0.90	✓
percentile rank			32	41	52	48									
# of funds in category			110	100	96	70									
Principal Global Real Estate Sec R6	PGRSX	Global Real Estate	-1.53	8.70	4.17	4.39	✓	16.10	0.98	18.01	✓	■	✓	0.90	✓
percentile rank			69	70	68	40									
# of funds in category			155	152	149	123									
<b>Fixed Income</b>															
PGIM Total Return Bond R6	PTRQX	Core Plus Bond	3.73	6.58	0.39	2.81	✓	6.42	0.99	22.93	✓	—	—	0.39	✓
percentile rank			25	12	41	21									
# of funds in category			563	535	483	353									
AB Global Bond Z	ANAZX	Global Bond	2.98	5.16	0.50	2.23	✓	4.94	0.75	20.10	✓	—	—	0.52	✓
percentile rank			69	51	42	45									
# of funds in category			107	101	96	61									
! Federated Hermes Instl High Yield Bd R6	FIHLX	High Yield Bond	6.53	10.19	4.71	—	✓	5.18	1.02	22.93	✓	—	—	0.49	✓
percentile rank			67	56	66	—									
# of funds in category			630	599	560	447									
Fidelity Inflation-Prot Bd Index	FIPDX	Inflation-Protected Bond	3.79	4.86	1.38	2.94	✓	4.65	0.98	11.38	✓	—	—	0.05	✓
percentile rank			43	37	34	32									
# of funds in category			160	151	141	117									
Fidelity U.S. Bond Index	FXNAX	Intermediate-Term Bond	2.75	4.87	-0.48	1.80	✓	6.46	1.00	11.38	✓	■	—	0.03	✓
percentile rank			68	62	59	53									
# of funds in category			534	485	432	309									
Lincoln Stable Value Account -LNGPA		Stable Value	—	—	—	—	—	—	—	42.44	✓	—	—	—	—
percentile rank			—	—	—	—									
# of funds in category			43	—	—	—									
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	4.86	5.14	2.99	—	✓	0.61	0.07	28.24	✓	—	—	0.24	✓
percentile rank			47	67	63	—									
# of funds in category			254	212	186	112									
<b>Balanced</b>															
Vanguard LifeStrategy Cnsrv Gr Inv	VSCGX	Target Risk	8.77	11.94	5.19	6.10	✓	7.97	0.97	3.60	✓	■	✓	0.12	✓
percentile rank			21	21	57	23									
# of funds in category			230	223	216	173									
Vanguard LifeStrategy Growth Inv	VASGX	Target Risk	14.56	19.11	10.73	10.13	✓	11.20	0.98	3.60	✓	■	✓	0.14	✓
percentile rank			18	17	28	12									
# of funds in category			180	176	169	136									

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Vanguard LifeStrategy Income Inv <i>percentile rank</i> <i># of funds in category</i>	VASIX	Target Risk	5.78	8.36	2.39	3.99		6.63	0.94	3.60				0.11	
			66	57	88	61									
			79	77	72	60									
Vanguard LifeStrategy Mod Gr Inv Shrs <i>percentile rank</i> <i># of funds in category</i>	VSMGX	Target Risk	11.62	15.49	7.94	8.13		9.54	0.97	3.60				0.13	
			24	21	41	17									
			417	412	395	318									