

MHSCMC 403(B) 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	
US Stock																
BNY Mellon S&P 500 Index	PEOPX	Large Blend Index	17.02	24.32	15.89	14.72	✔	13.36	1.00	4.93	✔	🇺🇸	✔	0.50	✔	
percentile rank			35	34	36	30										
# of funds in category			1,395	1,286	1,185	902										
American Funds Washington Mutual R4	RWMEX	Large Value	14.59	21.38	15.89	13.64	✔	11.58	0.76	28.27	✔	🇺🇸	✖	0.60	✔	
percentile rank			9	11	23	4										
# of funds in category			1,156	1,103	1,044	859										
BNY Mellon MidCap Index Inv	PESPX	Mid-Cap Blend	5.58	15.27	13.06	10.29	✔	18.04	1.06	4.93	✔	🇺🇸	✖	0.51	✔	
percentile rank			66	64	39	59										
# of funds in category			460	402	373	265										
MFS New Discovery R3	MNDHX	Small Growth	7.63	11.54	2.90	10.01	✔	17.89	0.81	11.76	✔	🇺🇸	✔	1.21	✔	
percentile rank			44	73	89	52										
# of funds in category			537	522	506	396										
Macquarie Small Cap Value A	DEV LX	Small Value	4.15	12.31	14.43	8.70	✔	20.28	0.91	13.26	✔	🇺🇸	✔	1.10	✔	
percentile rank			59	69	63	60										
# of funds in category			489	469	441	364										
Non-US Stock																
American Funds New World R4	RNWEX	Diversified Emerging Mkts	14.85	18.60	8.14	9.55	✔	12.80	0.73	26.31	✔	🇺🇸	✔	0.92	✔	
percentile rank			64	39	38	12										
# of funds in category			758	703	620	461										
American Funds Intl Gr and Inc R4	RIGEX	Foreign Large Blend	18.64	21.47	11.02	7.88	✔	13.54	1.00	17.01	✔	🇺🇸	✔	0.88	✔	
percentile rank			23	45	37	57										
# of funds in category			757	703	660	491										
BNY Mellon International Stock Index Inv	DIISX	Foreign Large Blend Index	14.69	21.29	10.61	7.64	✔	14.45	1.05	4.93	✔	🇺🇸	✔	0.60	✔	
percentile rank			68	48	47	66										
# of funds in category			757	703	660	491										
Alternative																
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	-2.34	8.97	7.03	6.12	✔	17.73	1.03	29.40	✔	—	✔	0.13	✔	
percentile rank			28	37	58	41										
# of funds in category			226	217	200	155										
Fixed Income																
🚩 BlackRock Inflation Protected Bond Inv A	BPRAX	Inflation-Protected Bond	3.38	4.67	1.24	2.71	✔	4.84	1.02	1.59	✖	—	—	1.34	✖	
percentile rank			70	61	50	62										
# of funds in category			160	151	141	117										
Baird Aggregate Bond Inv	BAGSX	Intermediate-Term Bond	2.90	5.30	-0.36	2.00	✔	6.52	1.01	25.02	✔	🇺🇸	—	0.55	✔	
percentile rank			51	30	46	35										
# of funds in category			534	485	432	309										

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PIMCO Income A	PONAX	Multisector Bond	6.81	8.44	3.87	4.47	✔	5.08	0.79	18.52	✔	—	—	0.94	✔
percentile rank			17	33	32	17									
# of funds in category			387	366	331	227									
Federated Hermes Govt Ultrashort Svc	FEUSX	Ultrashort Bond	4.74	5.01	2.87	2.05	✖	0.63	0.08	28.24	✔	—	—	0.36	✔
percentile rank			57	72	76	82									
# of funds in category			254	212	186	112									