

MURRAY EQUIPMENT INC 401K SALARY

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

Fund Removed from Approved List

Fund on Watch List

			Trailing Performance and Risk							Management	Style		Expense		
Name	Ticker	Asset Class	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															
JPMorgan US Equity R6	JUEMX	Large Blend	15.46	24.25	16.52	15.74	✔	13.54	1.00	11.13	✔	📊	✖	0.44	✔
percentile rank			51	36	17	5									
# 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									
State St Russell Lg Cap Gr® Indx NL CI C		Large Growth	25.50	31.59	17.54	18.78	✔	15.92	1.00	26.27	✔	📊	✔	0.04	✔
percentile rank			21	25	9	10									
# of funds in category			1,093	1,047	975	779									
Vanguard Value Index Adm	VVIAX	Large Value	9.16	17.61	15.01	12.09	✔	13.64	0.94	30.77	✔	📊	✔	0.05	✔
percentile rank			58	42	39	20									
# of funds in category			1,156	1,103	1,044	859									
Vanguard Mid-Cap Growth Index Admiral	VMGMX	Mid-Cap Growth	21.45	20.75	10.98	12.50	✔	17.52	0.92	2.16	✖	📊	✔	0.07	✔
percentile rank			21	24	20	26									
# of funds in category			507	490	458	381									
Vanguard Selected Value Inv	VASVX	Mid-Cap Value	5.40	19.39	17.44	10.61	✔	18.48	1.05	20.61	✔	📊	✔	0.42	✔
percentile rank			56	14	15	29									
# of funds in category			416	386	363	289									
Allspring Small Company Growth R6	WSCRX	Small Growth	3.33	11.89	8.35	9.18	✔	18.58	0.85	30.91	✔	📊	✔	0.86	✔
percentile rank			72	70	46	73									
# of funds in category			537	522	506	396									
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	11.95	15.89	7.34	10.47	✔	20.01	0.92	20.76	✔	📊	✔	0.07	✔
percentile rank			28	34	54	41									
# of funds in category			537	522	506	396									
DFA US Small Cap Value I	DFSVX	Small Value	4.99	15.73	19.58	10.22	✔	21.69	0.98	13.60	✔	📊	✔	0.31	✔
percentile rank			51	28	11	23									
# of funds in category			489	469	441	364									
Non-US Stock															
American Funds New World R6	RNWXG	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									
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	17.44	21.99	11.33	8.53	✔	14.70	1.08	12.61	✔	📊	✔	0.05	✔
percentile rank			33	34	28	31									
# of funds in category			757	703	660	491									
MFS International Equity R6	MIEIX	Foreign Large Growth	9.67	19.77	10.57	9.34	✔	14.36	1.03	16.01	✔	📊	✔	0.69	✔
percentile rank			88	73	49	13									
# of funds in category			757	703	660	491									
Schwab Fundamental Intl Equity Index Fd	SFNNX	Foreign Large Value	19.38	23.62	15.41	9.31	✔	14.02	1.00	8.44	✔	📊	✔	0.25	✔
percentile rank			55	48	27	18									
# of funds in category			365	349	330	250									

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Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	17.31	22.89	13.54	—		12.97	1.03	12.61		—		0.09	
<i>percentile rank</i>			23	27	27	—									
<i># of funds in category</i>			325	310	298	206									
Alternative															
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	
<i>percentile rank</i>			32	41	52	48									
<i># of funds in category</i>			110	100	96	70									
DFA Real Estate Securities I	DFREX	Real Estate	-4.37	8.20	7.05	6.51		17.16	0.99	13.60		—		0.18	
<i>percentile rank</i>			62	55	57	31									
<i># of funds in category</i>			226	217	200	155									
Fixed Income															
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	4.37	6.41	1.57	3.28		3.59	0.46	11.02		—	—	0.57	
<i>percentile rank</i>			22	19	9	9									
<i># of funds in category</i>			107	101	96	61									
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	7.28	10.28	4.80	5.46		4.76	0.93	3.09		—	—	0.12	
<i>percentile rank</i>			33	52	62	39									
<i># of funds in category</i>			630	599	560	447									
DFA Inflation-Protected Securities I	DIPSX	Inflation- Protected Bond	3.85	5.05	1.38	3.01		5.05	1.06	19.05		—	—	0.11	
<i>percentile rank</i>			39	29	37	19									
<i># of funds in category</i>			160	151	141	117									
Baird Aggregate Bond Inst	BAGIX	Intermediate- Term Bond	3.08	5.58	-0.12	2.26		6.54	1.01	25.02			—	0.30	
<i>percentile rank</i>			38	18	29	17									
<i># of funds in category</i>			534	485	432	309									
PIMCO Income Instl	PIMIX	Multisector Bond	7.24	8.87	4.28	4.88		5.08	0.79	18.52		—	—	0.54	
<i>percentile rank</i>			10	23	20	10									
<i># of funds in category</i>			387	366	331	227									
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	4.89	5.40	3.26	2.56		0.40	0.04	11.76		—	—	0.15	
<i>percentile rank</i>			44	44	29	37									
<i># of funds in category</i>			254	212	186	112									
Balanced															
American Funds American Balanced R6	RLBGX	Moderate Allocation	14.84	17.71	10.71	10.26		9.40	1.00	26.76		—		0.25	
<i>percentile rank</i>			4	9	13	10									
<i># of funds in category</i>			488	474	449	369									