

STANDARD SOLAR INC 401K

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															
American Funds Invmt Co of Amer R6 percentile rank # of funds in category	RICGX	Large Blend	20.86 8 1,395	28.54 4 1,286	17.69 7 1,185	14.84 27 902	✔	12.66	0.92	33.61	✔	🇺🇸	✔	0.27	✔
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	17.55 24 1,395	24.88 23 1,286	16.42 20 1,185	15.26 10 902	✔	13.37	1.00	7.84	✔	🇺🇸	✔	0.04	✔
Brown Advisory Sustainable Growth I percentile rank # of funds in category	BAFWX	Large Growth	9.45 92 1,093	22.30 84 1,047	12.45 70 975	16.31 46 779	✔	16.60	1.00	13.26	✔	🇺🇸	✔	0.61	✔
Vanguard Value Index Adm percentile rank # of funds in category	VVIAX	Large Value	9.16 58 1,156	17.61 42 1,103	15.01 39 1,044	12.09 20 859	✔	13.64	0.94	30.77	✔	🇺🇸	✔	0.05	✔
Vanguard Mid-Cap Growth Index Admiral percentile rank # of funds in category	VMGMX	Mid-Cap Growth	21.45 21 507	20.75 24 490	10.98 20 458	12.50 26 381	✔	17.52	0.92	2.16	✖	🇺🇸	✔	0.07	✔
Vanguard Mid-Cap Value Index Admiral percentile rank # of funds in category	VMVAX	Mid-Cap Value	6.50 49 416	15.47 44 386	13.99 56 363	10.13 42 289	✔	16.07	0.94	2.16	✖	🇺🇸	✔	0.07	✔
Vanguard Small Cap Growth Index Admiral percentile rank # of funds in category	VSGAX	Small Growth	11.95 28 537	15.89 34 522	7.34 54 506	10.47 41 396	✔	20.01	0.92	20.76	✔	🇺🇸	✔	0.07	✔
Vanguard Small Cap Value Index Admiral percentile rank # of funds in category	VSIAX	Small Value	6.10 40 489	15.87 26 469	15.93 40 441	10.22 22 364	✔	19.24	0.86	9.43	✔	🇺🇸	✔	0.07	✔
Non-US Stock															
American Funds New World R6 percentile rank # of funds in category	RNWXG	Diversified Emerging Mkts	15.26 60 758	19.02 33 703	8.52 34 620	9.93 8 461	✔	12.80	0.73	26.31	✔	🇺🇸	✔	0.57	✔
Hartford Schroders International Stk SDR percentile rank # of funds in category	SCIJX	Foreign Large Blend	15.80 51 757	21.99 34 703	10.49 51 660	10.02 5 491	✔	14.26	1.02	15.59	✔	🇺🇸	✖	0.69	✔
Vanguard Developed Markets Index Admiral percentile rank # of funds in category	VTMGX	Foreign Large Blend Index	17.44 33 757	21.99 34 703	11.33 28 660	8.53 31 491	✔	14.70	1.08	12.61	✔	🇺🇸	✔	0.05	✔
American Funds EUPAC R6 percentile rank # of funds in category	REGGX	Foreign Large Growth	14.79 22 395	19.65 35 377	7.49 36 342	8.28 45 230	✔	14.52	1.02	24.35	✔	🇺🇸	✔	0.47	✔
Causeway International Value Instl percentile rank # of funds in category	CIVIX	Foreign Large Value	18.32 62 365	27.75 7 349	17.06 11 330	8.85 26 250	✔	15.09	1.05	23.95	✔	🇺🇸	✖	0.85	✔

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Vanguard Total World Stock Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VTWAX	Global Stock	17.31 23 325	22.89 27 310	13.54 27 298	— — 206	✔ 	12.97	1.03	12.61	✔ 	— 	✔ 	0.09	✔ 	
Alternative																
⚠ DWS Enhanced Commodity Strategy R6 <i>percentile rank</i> <i># of funds in category</i>	SKRRX	Commodities Broad Basket	4.72 91 110	1.75 89 100	10.08 96 96	— — 70	✖ 	8.79	0.83	15.51	✔ 	— 	— 	0.85	✔ 	
Vanguard Real Estate Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VGSLX	Real Estate	-2.34 28 226	8.97 37 217	7.03 58 200	6.12 41 155	✔ 	17.73	1.03	29.40	✔ 	— 	✔ 	0.13	✔ 	
Fixed Income																
PIMCO International Bond (USD-Hdg) Instl <i>percentile rank</i> <i># of funds in category</i>	PFORX	Global Bond	4.37 22 107	6.41 19 101	1.57 9 96	3.28 9 61	✔ 	3.59	0.46	11.02	✔ 	— 	— 	0.57	✔ 	
Vanguard High-Yield Corporate Adm <i>percentile rank</i> <i># of funds in category</i>	VWEAX	High Yield Bond	7.28 33 630	10.28 52 599	4.80 62 560	5.46 39 447	✔ 	4.76	0.93	3.09	✔ 	— 	— 	0.12	✔ 	
Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation- Protected Bond	3.56 60 160	4.74 51 151	1.33 42 141	2.88 39 117	✔ 	4.82	1.02	3.90	✔ 	— 	— 	0.10	✔ 	
Baird Aggregate Bond Inst <i>percentile rank</i> <i># of funds in category</i>	BAGIX	Intermediate- Term Bond	3.08 38 534	5.58 18 485	-0.12 29 432	2.26 17 309	✔ 	6.54	1.01	25.02	✔ 	🟡 	— 	0.30	✔ 	
Nuveen Core Impact Bond R6 <i>percentile rank</i> <i># of funds in category</i>	TSBIX	Intermediate- Term Bond	3.29 30 534	5.38 27 485	-0.04 25 432	2.14 25 309	✔ 	6.34	0.98	13.03	✔ 	🟡 	— 	0.35	✔ 	
Lincoln Stable Value Account -LNGPA <i>percentile rank</i> <i># of funds in category</i>		Stable Value	— — 43	— — —	— — —	— — —	— 	—	—	42.44	✔ 	— 	— 	—	—	
Vanguard Ultra-Short-Term Bond Admiral <i>percentile rank</i> <i># of funds in category</i>	VUSFX	Ultrashort Bond	4.92 42 254	5.36 49 212	3.01 60 186	2.49 48 112	✔ 	0.74	0.10	5.87	✔ 	— 	— 	0.09	✔ 	
Target Date																
Vanguard Target Retirement 2020 Fund <i>percentile rank</i> <i># of funds in category</i>	VTWNX	Target Date	8.59 39 129	11.98 56 112	6.03 57 101	6.99 44 63	✔ 	7.54	0.86	12.61	✔ 	— 	✔ 	0.08	✔ 	
Vanguard Target Retirement 2025 Fund <i>percentile rank</i> <i># of funds in category</i>	VTVX	Target Date	10.52 4 163	14.31 16 145	7.38 17 128	7.99 18 87	✔ 	8.82	0.93	12.61	✔ 	— 	✔ 	0.08	✔ 	

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Vanguard Target Retirement 2030 Fund	VTHRX	Target Date	11.70	15.92	8.50	8.78	✔	9.74	0.95	12.61	✔	—	✔	0.08	✔
percentile rank			1	5	15	27									
# of funds in category			240	219	199	132									
Vanguard Target Retirement 2035 Fund	VTTX	Target Date	12.84	17.29	9.56	9.55	✔	10.36	0.94	12.61	✔	—	✔	0.08	✔
percentile rank			4	28	34	30									
# of funds in category			235	210	190	132									
Vanguard Target Retirement 2040 Fund	VFORX	Target Date	13.90	18.67	10.62	10.30	✔	10.96	0.93	12.61	✔	—	✔	0.08	✔
percentile rank			19	40	49	35									
# of funds in category			234	212	192	132									
Vanguard Target Retirement 2045 Fund	VTIVX	Target Date	14.94	20.02	11.66	10.89	✔	11.60	0.94	12.61	✔	—	✔	0.08	✔
percentile rank			19	35	41	29									
# of funds in category			229	210	190	132									
Vanguard Target Retirement 2050 Fund	VFIFX	Target Date	16.08	21.03	12.20	11.16	✔	12.04	0.95	12.61	✔	—	✔	0.08	✔
percentile rank			4	27	31	16									
# of funds in category			233	212	192	132									
Vanguard Target Retirement 2055 Fund	VFFVX	Target Date	16.07	21.03	12.20	11.15	✔	12.05	0.95	12.61	✔	—	✔	0.08	✔
percentile rank			10	34	40	22									
# of funds in category			228	209	189	132									
Vanguard Target Retirement 2060 Fund	VTTSX	Target Date	16.05	21.03	12.20	11.15	✔	12.04	1.20	12.61	✔	—	✔	0.08	✔
percentile rank			16	39	42	30									
# of funds in category			227	208	183	80									
Vanguard Target Retirement 2065 Fund	VLVX	Target Date	16.02	21.02	12.20	—	✔	12.02	1.20	8.22	✔	—	✔	0.08	✔
percentile rank			20	46	49	—									
# of funds in category			314	188	127	—									
Vanguard Target Retirement 2070 Fund	VSVNX	Target Date	16.00	21.03	—	—	✔	12.02	1.20	3.26	✔	—	✔	0.53	✔
percentile rank			23	42	—	—									
# of funds in category			314	188	127	—									
Vanguard Target Retirement Income Fund	VTINX	Target Date	7.89	10.30	4.55	5.29	✔	6.61	0.96	12.61	✔	—	✔	0.08	✔
percentile rank			20	53	50	46									
# of funds in category			184	167	150	101									
Balanced															
Vanguard LifeStrategy Cnsvr 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									
Vanguard LifeStrategy Income Inv	VASIX	Target Risk	5.78	8.36	2.39	3.99	✔	6.63	0.94	3.60	✔	🗼	✔	0.11	✔
percentile rank			66	57	88	61									
# of funds in category			79	77	72	60									
Vanguard LifeStrategy Mod Gr Inv Shrs	VSMGX	Target Risk	11.62	15.49	7.94	8.13	✔	9.54	0.97	3.60	✔	🗼	✔	0.13	✔
percentile rank			24	21	41	17									
# of funds in category			417	412	395	318									