

BADGER TRUCK CENTER INC 401K PLAN

Screens Summary (Data as of 03-31-2019)

⊖ 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																
MFS Massachusetts Investors Tr R6 <i>percentile rank</i> <i># of funds in category</i>	MITJX	Large Blend	9.30 26 1,418	14.12 6 1,224	10.23 30 1,085	– – 817	✔	10.79	0.98	14.76	✔	☒	✖	0.39	✔	
Vanguard 500 Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VFIAX	Large Blend Index	9.46 22 1,418	13.47 17 1,224	10.87 10 1,085	15.90 15 817	✔	10.73	1.00	2.93	✖	☒	✔	0.04	✔	
MFS Growth R6 <i>percentile rank</i> <i># of funds in category</i>	MFEKX	Large Growth	14.95 13 1,405	18.14 19 1,269	13.75 16 1,125	– – 815	✔	12.49	0.99	17.01	✔	☒	✔	0.57	✔	
Invesco Growth and Income R6 <i>percentile rank</i> <i># of funds in category</i>	GIFFX	Large Value	0.55 84 1,233	11.41 17 1,100	7.25 49 942	– – 699	✔	13.12	1.18	16.09	✔	☒	✔	0.38	✔	
MFS Mid Cap Growth R6 <i>percentile rank</i> <i># of funds in category</i>	OTCKX	Mid-Cap Growth	14.12 14 616	17.05 20 556	12.52 8 496	– – 353	✔	12.63	0.92	10.36	✔	☒	✔	0.81	✔	
Vanguard Mid-Cap Value Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VMVAX	Mid-Cap Value	1.05 41 417	9.77 30 368	7.70 16 318	– – 225	✔	11.89	0.98	12.63	✔	☒	✔	0.07	✔	
State St Russell Sm Cap® Gr Indx NL Cl C <i>percentile rank</i> <i># of funds in category</i>		Small Growth	3.72 74 681	14.74 59 592	8.30 56 525	– – 396	✔	16.26	1.00	9.66	✔	☒	✔	–	–	
State St Russell Sm Cp® Val Indx NL Cl C <i>percentile rank</i> <i># of funds in category</i>		Small Value	0.23 20 440	10.85 15 393	5.56 22 346	– – 238	✔	16.08	1.00	9.66	✔	☒	✔	–	–	
Non-US Stock																
Oppenheimer Developing Markets I <i>percentile rank</i> <i># of funds in category</i>	ODVIX	Diversified Emerging Mkts	-3.75 9 833	11.81 18 707	3.88 23 553	– – 239	✔	12.27	0.89	11.92	✔	☒	✔	0.87	✔	
American Funds Europacific Growth R6 <i>percentile rank</i> <i># of funds in category</i>	REGGX	Foreign Large Blend	-4.66 64 442	9.33 31 373	4.27 39 314	– – 235	✔	11.38	1.01	27.27	✔	☒	✔	0.49	✔	
Oppenheimer International Growth A <i>percentile rank</i> <i># of funds in category</i>	OIGAX	Foreign Large Growth	-10.50 96 442	3.13 98 373	0.99 94 314	9.84 50 235	✔	11.78	1.05	23.03	✔	☒	✔	1.11	✔	
Vanguard International Value Inv <i>percentile rank</i> <i># of funds in category</i>	VTRIX	Foreign Large Value	-5.86 38 314	7.92 18 275	1.78 19 225	8.47 33 148	✔	10.08	0.93	10.88	✔	☒	✖	0.38	✔	
American Funds Capital World Gr&Inc R6 <i>percentile rank</i> <i># of funds in category</i>	RWIGX	World Stock	0.62 63 904	10.40 39 738	6.34 41 622	– – 376	✔	9.63	0.87	26.03	✔	☒	✔	0.44	✔	

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Alternative															
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	-5.41	2.92	-8.90	-0.19		10.77	1.07	11.25		—	—	1.24	
<i>percentile rank</i>			42	47	62	10									
<i># of funds in category</i>			125	110	94	34									
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	20.04	5.72	8.79	18.33		13.82	0.98	22.90		—		0.11	
<i>percentile rank</i>			16	49	41	25									
<i># of funds in category</i>			251	225	198	139									
Fixed Income															
Eaton Vance Income Fund of Boston R6	EIBRX	High Yield Bond	4.94	6.50	—	—		3.83	0.81	23.26		—	—	0.66	
<i>percentile rank</i>			39	64	—	—									
<i># of funds in category</i>			701	611	520	332									
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	2.67	1.57	1.87	3.31		3.12	1.02	7.62		—	—	0.10	
<i>percentile rank</i>			14	50	22	33									
<i># of funds in category</i>			225	200	170	105									
Baird Aggregate Bond Instl	BAGIX	Intermediate-Term Bond	4.59	2.55	3.13	5.18		2.97	1.00	18.51			—	0.30	
<i>percentile rank</i>			17	38	14	29									
<i># of funds in category</i>			1,024	901	769	564									
PIMCO Income Instl	PIMIX	Multisector Bond	3.91	6.33	5.48	10.43		1.74	0.41	12.01		—	—	0.72	
<i>percentile rank</i>			29	10	1	1									
<i># of funds in category</i>			326	294	228	131									
Federated Government Ultrashrt Dur R6	FGULX	Ultrashort Bond	2.05	1.36	—	—	—	0.24	0.01	21.74		—	—	0.24	
<i>percentile rank</i>			85	78	—	—									
<i># of funds in category</i>			187	151	134	63									
Templeton Global Bond R6	FBNRX	World Bond	2.19	4.33	2.03	—		5.90	-0.18	17.26		—	—	0.49	
<i>percentile rank</i>			42	9	27	—									
<i># of funds in category</i>			308	257	239	145									
Target Date															
Vanguard Target Retirement 2015 Inv	VTXVX	Target Date	3.87	6.28	4.98	9.25		4.39	0.89	6.10		—		0.13	
<i>percentile rank</i>			33	51	29	47									
<i># of funds in category</i>			139	112	83	50									
Vanguard Target Retirement 2020 Inv	VTWNX	Target Date	3.82	7.39	5.65	10.19		5.58	1.01	6.10		—		0.13	
<i>percentile rank</i>			33	25	5	23									
<i># of funds in category</i>			252	205	167	106									
Vanguard Target Retirement 2025 Inv	VTTVX	Target Date	3.83	8.20	6.07	10.95		6.44	1.04	6.10		—		0.13	
<i>percentile rank</i>			34	28	5	22									
<i># of funds in category</i>			228	188	148	74									
Vanguard Target Retirement 2030 Inv	VTHRX	Target Date	3.71	8.87	6.39	11.65		7.18	1.01	6.10		—		0.14	
<i>percentile rank</i>			36	35	16	20									
<i># of funds in category</i>			241	195	157	96									

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Vanguard Target Retirement 2035 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTHX	Target Date	3.55 32 223	9.52 36 183	6.69 19 143	12.27 20 69	✔	7.92	0.98	6.10	✔	—	✔	0.14	✔
Vanguard Target Retirement 2040 Inv <i>percentile rank</i> <i># of funds in category</i>	VFORX	Target Date	3.38 38 241	10.20 28 195	6.96 21 157	12.55 17 96	✔	8.66	0.98	6.10	✔	—	✔	0.14	✔
Vanguard Target Retirement 2045 Inv <i>percentile rank</i> <i># of funds in category</i>	VTIVX	Target Date	3.27 42 223	10.43 31 183	7.08 16 143	12.63 19 68	✔	9.14	0.99	6.10	✔	—	✔	0.15	✔
Vanguard Target Retirement 2050 Inv <i>percentile rank</i> <i># of funds in category</i>	VFIFX	Target Date	3.27 38 241	10.43 36 195	7.08 22 157	12.63 19 78	✔	9.15	0.98	6.10	✔	—	✔	0.15	✔
Vanguard Target Retirement 2055 Inv <i>percentile rank</i> <i># of funds in category</i>	VFFVX	Target Date	3.28 38 223	10.43 43 181	7.05 26 135	— — 9	✔	9.13	0.97	6.10	✔	—	✔	0.15	✔
Vanguard Target Retirement 2060 Inv <i>percentile rank</i> <i># of funds in category</i>	VTTSX	Target Date	3.25 44 206	10.42 48 125	7.05 1 10	— — —	✔	9.14	0.97	6.10	✔	—	✔	0.15	✔
Vanguard Target Retirement 2065 Inv <i>percentile rank</i> <i># of funds in category</i>	VLXVX	Target Date	3.24 46 206	— — 125	— — 10	— — —	—	—	—	1.72	✖	—	✔	0.15	✔
Vanguard Target Retirement Income Inv <i>percentile rank</i> <i># of funds in category</i>	VTINX	Target Date	3.92 35 186	4.87 48 162	4.13 23 127	6.69 53 91	✔	3.45	0.87	6.10	✔	—	✔	0.12	✔
Balanced															
Vanguard LifeStrategy Cnsvr Gr Inv <i>percentile rank</i> <i># of funds in category</i>	VSCGX	Target Risk	4.28 27 558	5.99 32 489	4.99 13 386	7.96 44 268	✔	4.38	1.00	24.52	✔	—	✔	0.12	✔
Vanguard LifeStrategy Growth Inv <i>percentile rank</i> <i># of funds in category</i>	VASGX	Target Risk	3.50 32 358	9.53 24 324	6.71 17 283	11.76 26 195	✔	8.15	1.01	24.52	✔	—	✔	0.14	✔
Vanguard LifeStrategy Income Inv <i>percentile rank</i> <i># of funds in category</i>	VASIX	Target Risk	4.57 9 205	4.16 51 186	4.02 14 153	5.93 47 87	✔	3.00	0.39	24.52	✔	—	✔	0.11	✔
Vanguard LifeStrategy Moderate Gr Inv <i>percentile rank</i> <i># of funds in category</i>	VSMGX	Target Risk	3.91 42 760	7.78 38 692	5.89 32 603	9.90 51 440	✔	6.20	1.01	24.52	✔	—	✔	0.13	✔