

PIONEER SPINE AND SPORTS PHYSICIANS

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																
T. Rowe Price Dividend Growth <i>percentile rank</i> <i># of funds in category</i>	PRDGX	Large Blend	12.63 6 1,418	13.36 21 1,224	11.03 8 1,085	15.30 36 817	✔	9.45	0.85	19.01	✔	☐	✔	0.64	✔	
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	✔	
American Funds Growth Fund of Amer R6 <i>percentile rank</i> <i># of funds in category</i>	RGAGX	Large Growth	7.67 77 1,405	16.12 37 1,269	11.87 47 1,125	- - 815	✔	11.75	0.92	25.43	✔	☐	✔	0.32	✔	
Invesco Growth and Income Y <i>percentile rank</i> <i># of funds in category</i>	ACGMX	Large Value	0.38 85 1,233	11.23 21 1,100	7.07 52 942	13.45 57 699	✔	13.12	1.18	16.09	✔	☐	✔	0.55	✔	
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	✔	
Vanguard Small Cap Growth Index Inv <i>percentile rank</i> <i># of funds in category</i>	VISGX	Small Growth	10.26 35 681	15.63 51 592	8.58 50 525	17.41 28 396	✔	15.00	0.91	14.26	✔	☐	✖	0.19	✔	
Victory Sycamore Small Company Opp I <i>percentile rank</i> <i># of funds in category</i>	VSOIX	Small Value	2.93 8 440	13.16 3 393	8.84 1 346	16.36 11 238	✔	14.47	0.87	20.84	✔	☐	✖	0.88	✔	
Non-US Stock																
American Funds New World R6 <i>percentile rank</i> <i># of funds in category</i>	RNWGX	Diversified Emerging Mkts	-1.10 2 833	11.54 20 707	4.77 12 553	- - 239	✔	10.40	0.74	19.80	✔	☐	✔	0.62	✔	
American Funds Europacific Growth R6 <i>percentile rank</i> <i># of funds in category</i>	REGX	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 Y <i>percentile rank</i> <i># of funds in category</i>	OIGYX	Foreign Large Growth	-10.29 95 442	3.38 98 373	1.24 93 314	10.21 41 235	✔	11.78	1.05	23.03	✔	☐	✔	0.86	✔	
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 New Perspective R6 <i>percentile rank</i> <i># of funds in category</i>	RNPGX	World Stock	5.34 22 904	13.37 14 738	9.18 11 622	- - 376	✔	10.82	0.92	18.34	✔	☐	✔	0.44	✔	

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Alternative																
PIMCO Commodity Real Return Strat I2	PCRPX	Commodities Broad Basket	-5.52	2.84	-8.96	-0.30	✔	10.79	1.07	11.25	✔	—	—	1.34	✔	
<i>percentile rank</i>			49	50	62	12										
<i># of funds in category</i>			125	110	94	34										
American Century Real Estate I	REAIX	Real Estate	18.33	5.42	8.51	18.33	✔	12.88	0.91	10.37	✔	—	✖	0.95	✔	
<i>percentile rank</i>			45	55	48	25										
<i># of funds in category</i>			251	225	198	139										
Fixed Income																
BlackRock High Yield Bond Instl	BHYIX	High Yield Bond	4.97	8.10	4.33	11.30	✔	4.53	0.96	11.25	✔	—	—	0.61	✔	
<i>percentile rank</i>			38	22	17	9										
<i># of funds in category</i>			701	611	520	332										
American Century Inflation Adjs Bond R5	AIANX	Inflation- Protected Bond	1.83	1.51	1.62	3.12	✔	3.08	1.00	17.34	✔	—	—	0.27	✔	
<i>percentile rank</i>			81	54	32	43										
<i># of funds in category</i>			225	200	170	105										
Vanguard Total Bond Market Index Adm	VBTLX	Intermediate- Term Bond	4.45	1.98	2.67	3.69	✔	3.06	1.02	6.10	✔	🇺🇸	—	0.05	✔	
<i>percentile rank</i>			25	66	42	76										
<i># of funds in category</i>			1,024	901	769	564										
PIMCO Income I2	PONPX	Multisector Bond	3.80	6.22	5.38	10.33	✔	1.74	0.41	12.01	✔	—	—	0.82	✔	
<i>percentile rank</i>			33	10	1	1										
<i># of funds in category</i>			326	294	228	131										
PIMCO Short-Term I2	PTSPX	Ultrashort Bond	2.21	2.53	1.77	2.18	✔	0.83	-0.13	8.25	✔	—	—	0.67	✖	
<i>percentile rank</i>			73	8	6	25										
<i># of funds in category</i>			187	151	134	63										
Templeton Global Bond Adv	TGBAX	World Bond	2.06	4.18	1.88	5.63	✔	5.90	-0.18	17.26	✔	—	—	0.61	✔	
<i>percentile rank</i>			43	10	29	20										
<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	✔