

**SANSUM CLINIC MATCH 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	
<b>US Stock</b>																
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	✓	
Fidelity® Contrafund® <i>percentile rank</i> <i># of funds in category</i>	FCNTX	Large Growth	8.78 67 1,405	15.89 41 1,269	12.20 42 1,125	16.22 45 815	✓	12.70	1.01	28.55	✓	☐	✓	0.81	✓	
American Funds Washington Mutual R6 <i>percentile rank</i> <i># of funds in category</i>	RWMGX	Large Value	8.93 34 1,418	13.09 32 1,224	10.05 35 1,085	– – 817	✓	9.26	0.83	21.76	✓	☐	✓	0.29	✓	
Neuberger Berman Mid Cap Growth Inst <i>percentile rank</i> <i># of funds in category</i>	NBMLX	Mid-Cap Growth	8.00 55 616	15.17 36 556	10.01 33 496	15.65 54 353	✓	14.51	1.08	16.17	✓	☐	✓	0.70	✓	
American Century Mid Cap Value I <i>percentile rank</i> <i># of funds in category</i>	AVUAX	Mid-Cap Value	1.07 41 417	8.92 48 368	8.48 8 318	15.42 34 225	✓	12.14	0.99	15.01	✓	☐	✓	0.76	✓	
Carillon Eagle Small Cap Growth I <i>percentile rank</i> <i># of funds in category</i>	HSIIX	Small Growth	4.03 70 681	14.27 63 592	8.48 53 525	16.65 42 396	✓	16.29	0.97	23.26	✓	☐	✓	0.75	✓	
Delaware Small Cap Value Instl <i>percentile rank</i> <i># of funds in category</i>	DEVIX	Small Value	-3.34 53 440	10.04 22 393	5.84 18 346	15.13 33 238	✓	15.84	0.96	21.93	✓	☐	✖	0.90	✓	
<b>Non-US Stock</b>																
JPMorgan Emerging Markets Equity R5 <i>percentile rank</i> <i># of funds in category</i>	JEMOX	Diversified Emerging Mkts	-2.70 5 833	– – 707	– – 553	– – 239	–	–	–	13.59	✓	☐	✓	0.89	✓	
Vanguard Developed Markets Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VTMGX	Foreign Large Blend Index	-4.72 49 753	7.59 23 644	2.72 25 514	9.15 26 384	✓	10.50	0.98	6.10	✓	☐	✓	0.07	✓	
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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<b>Alternative</b>															
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									
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									
<b>Fixed Income</b>															
Eaton Vance Income Fund of Boston I	EIBIX	High Yield Bond	4.84	6.47	4.20	10.73	✓	3.83	0.81	23.26	✓	—	—	0.74	✓
<i>percentile rank</i>			42	65	21	16									
<i># of funds in category</i>			701	611	520	332									
BlackRock Inflation Protected Bond Instl	BPRIX	Inflation- Protected Bond	1.86	1.60	1.41	3.06	✓	2.99	0.98	2.12	✖	—	—	0.50	✓
<i>percentile rank</i>			80	46	47	48									
<i># of funds in category</i>			225	200	170	105									
Baird Aggregate Bond Inst	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 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									
Federated Government Ultrashrt Dur Instl	FGUSX	Ultrashort Bond	2.03	1.34	0.82	0.71	✖	0.25	0.01	21.74	✓	—	—	0.26	✓
<i>percentile rank</i>			85	80	83	79									
<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									
<b>Target Date</b>															
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

⚠ BlackRock Global Allocation Instl <i>percentile rank</i> <i># of funds in category</i>	MALOX	World Allocation	-0.04 53 467	5.75 61 397	3.46 45 323	7.53 74 165	✔	6.39	0.97	15.26	✔	📅	✔	0.80	✔
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