

STIR LLC 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																
JPMorgan US Equity R6 <i>percentile rank</i> <i># of funds in category</i>	JUEMX	Large Blend	8.07 47 1,418	13.34 23 1,224	10.30 28 1,085	— — 817		12.06	1.11	18.25				0.46		
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		
Vanguard Mid Cap Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VIMAX	Mid-Cap Blend	5.98 21 456	11.59 28 376	8.85 11 329	16.67 11 234		12.05	0.98	20.87				0.05		
DFA US Small Cap I <i>percentile rank</i> <i># of funds in category</i>	DFSTX	Small Blend	-0.83 64 736	9.73 58 632	6.15 47 519	16.43 14 382		15.76	0.98	7.09				0.37		
Non-US Stock																
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		
Fixed Income																
Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation-Protected Bond	2.67 14 225	1.57 50 200	1.87 22 170	3.31 33 105		3.12	1.02	7.62		—	—	0.10		
Western Asset Core Bond IS <i>percentile rank</i> <i># of funds in category</i>	WACSX	Intermediate-Term Bond	4.96 8 1,024	3.23 15 901	3.72 4 769	7.27 3 564		3.21	1.05	24.27			—	0.42		
PIMCO Short-Term Instl <i>percentile rank</i> <i># of funds in category</i>	PTSHX	Ultrashort Bond	2.31 64 187	2.63 6 151	1.87 5 134	2.29 22 63		0.83	-0.13	8.25		—	—	0.57		
Target Date																
T. Rowe Price Retirement I 2010 I <i>percentile rank</i> <i># of funds in category</i>	TRPAX	Target Date	3.81 22 138	6.57 9 113	— — 92	— — 72		4.65	1.04	3.50		—		0.39		
T. Rowe Price Retirement I 2015 I <i>percentile rank</i> <i># of funds in category</i>	TRFGX	Target Date	3.71 37 139	7.34 9 112	— — 83	— — 50		5.33	1.07	3.50		—		0.43		
T. Rowe Price Retirement I 2020 I <i>percentile rank</i> <i># of funds in category</i>	TRBRX	Target Date	3.71 37 252	8.36 3 205	— — 167	— — 106		6.18	1.11	3.50		—		0.47		

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T. Rowe Price Retirement I 2025 I <i>percentile rank</i> <i># of funds in category</i>	TRPHX	Target Date	3.62 39 228	9.15 3 188	— — 148	— — 74		7.01	1.12	3.50		—		0.50	
T. Rowe Price Retirement I 2030 I <i>percentile rank</i> <i># of funds in category</i>	TRPCX	Target Date	3.59 41 241	9.90 4 195	— — 157	— — 96		7.77	1.08	3.50		—		0.53	
T. Rowe Price Retirement I 2035 I <i>percentile rank</i> <i># of funds in category</i>	TRPJX	Target Date	3.49 36 223	10.46 9 183	— — 143	— — 69		8.38	1.02	3.50		—		0.56	
T. Rowe Price Retirement I 2040 I <i>percentile rank</i> <i># of funds in category</i>	TRPDX	Target Date	3.47 30 241	10.93 4 195	— — 157	— — 96		8.92	1.00	3.50		—		0.58	
T. Rowe Price Retirement I 2045 I <i>percentile rank</i> <i># of funds in category</i>	TRPKX	Target Date	3.39 32 223	11.07 5 183	— — 143	— — 68		9.20	0.99	3.50		—		0.59	
T. Rowe Price Retirement I 2050 I <i>percentile rank</i> <i># of funds in category</i>	TRPMX	Target Date	3.41 32 241	11.07 6 195	— — 157	— — 78		9.19	0.97	3.50		—		0.59	
T. Rowe Price Retirement I 2055 I <i>percentile rank</i> <i># of funds in category</i>	TRPNX	Target Date	3.44 31 223	11.06 8 181	— — 135	— — 9		9.17	0.97	3.50		—		0.59	
T. Rowe Price Retirement I 2060 I <i>percentile rank</i> <i># of funds in category</i>	TRPLX	Target Date	3.41 33 206	11.08 11 125	— — 10	— — —		9.19	0.97	3.50		—		0.59	

Balanced

American Funds American Balanced R6 <i>percentile rank</i> <i># of funds in category</i>	RLBGX	Moderate Allocation	6.56 18 760	9.29 11 692	7.83 5 603	— — 440		6.16	0.97	22.26		—		0.28	
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