

**WESTMORELAND ELECTRIC INC 401K**

## 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 <i>percentile rank</i> <i># of funds in category</i>	PCRPX	Commodities Broad Basket	-5.52 49 125	2.84 50 110	-8.96 62 94	-0.30 12 34	✔	10.79	1.07	11.25	✔	—	—	1.34	✔	
Vanguard Real Estate Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VGSLX	Real Estate	20.04 16 251	5.72 49 225	8.79 41 198	18.33 25 139	✔	13.82	0.98	22.90	✔	—	✔	0.11	✔	
<b>Fixed Income</b>																
Eaton Vance Income Fund of Boston I <i>percentile rank</i> <i># of funds in category</i>	EIBIX	High Yield Bond	4.84 42 701	6.47 65 611	4.20 21 520	10.73 16 332	✔	3.83	0.81	23.26	✔	—	—	0.74	✔	
BlackRock Inflation Protected Bond Instl <i>percentile rank</i> <i># of funds in category</i>	BPRIX	Inflation- Protected Bond	1.86 80 225	1.60 46 200	1.41 47 170	3.06 48 105	✔	2.99	0.98	2.12	✖	—	—	0.50	✔	
Baird Aggregate Bond Inst <i>percentile rank</i> <i># of funds in category</i>	BAGIX	Intermediate- Term Bond	4.59 17 1,024	2.55 38 901	3.13 14 769	5.18 29 564	✔	2.97	1.00	18.51	✔	☒	—	0.30	✔	
PIMCO Income I2 <i>percentile rank</i> <i># of funds in category</i>	PONPX	Multisector Bond	3.80 33 326	6.22 10 294	5.38 1 228	10.33 1 131	✔	1.74	0.41	12.01	✔	—	—	0.82	✔	
Federated Government Ultrashrt Dur Instl <i>percentile rank</i> <i># of funds in category</i>	FGUSX	Ultrashort Bond	2.03 85 187	1.34 80 151	0.82 83 134	0.71 79 63	✖	0.25	0.01	21.74	✔	—	—	0.26	✔	
Templeton Global Bond Adv <i>percentile rank</i> <i># of funds in category</i>	TGBAX	World Bond	2.06 43 308	4.18 10 257	1.88 29 239	5.63 20 145	✔	5.90	-0.18	17.26	✔	—	—	0.61	✔	
<b>Target Date</b>																
American Funds 2010 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFTTX	Target Date	4.37 12 138	6.02 34 113	4.94 1 92	— — 72	✔	4.10	0.90	12.17	✔	—	✔	0.33	✔	
American Funds 2015 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFJTX	Target Date	4.58 10 139	6.45 36 112	5.23 8 83	— — 50	✔	4.46	0.89	12.17	✔	—	✔	0.33	✔	
American Funds 2020 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RRCTX	Target Date	4.61 12 252	7.12 34 205	5.70 1 167	— — 106	✔	4.86	0.87	12.17	✔	—	✔	0.34	✔	
American Funds 2025 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFDTX	Target Date	4.42 13 228	8.18 30 188	6.27 1 148	— — 74	✔	5.80	0.92	12.17	✔	—	✔	0.36	✔	

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American Funds 2030 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFETX	Target Date	4.48 14 241	9.65 10 195	7.12 1 157	— — 96		6.92	0.96	12.17		—		0.38	
American Funds 2035 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFCTX	Target Date	4.61 12 223	10.88 1 183	7.77 1 143	— — 69		8.14	0.99	12.17		—		0.39	
American Funds 2040 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFCTX	Target Date	4.63 9 241	11.28 1 195	7.98 1 157	— — 96		8.56	0.95	12.17		—		0.40	
American Funds 2045 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFHTX	Target Date	4.61 6 223	11.50 1 183	8.12 1 143	— — 68		8.74	0.93	12.17		—		0.40	
American Funds 2050 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFITX	Target Date	4.66 7 241	11.62 1 195	8.19 1 157	— — 78		8.83	0.93	12.17		—		0.41	
American Funds 2055 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFKTX	Target Date	4.64 5 223	11.62 1 181	8.18 1 135	— — 9		8.87	0.93	9.16		—		0.42	
American Funds 2060 Trgt Date Retire R6 <i>percentile rank</i> <i># of funds in category</i>	RFUTX	Target Date	4.55 10 206	11.58 1 125	— — 10	— —		8.83	0.93	4.01		—		0.44	

**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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