

JOHNSON LUMBER CO., INC PSP & TRUST**Screens Summary (Data as of 03-31-2023)**
⊖ Fund Removed from Approved List
⚠ Fund on Watch List

Name	Ticker	Asset Class	Trailing Performance and Risk				Management Style				Expense		ESG Metrics					
			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	Sustain. Rating <i>Updated</i>	Commit. Level <i>Updated</i>	Carbon Risk <i>Updated</i>
US Stock																		
T. Rowe Price Dividend Growth <i>percentile rank</i> <i># of funds in category</i>	PRDGX	Large Blend	-3.78 12 1,386	17.35 67 1,254	11.41 14 1,144	11.90 23 847	✓	16.74	0.85	23.01	✓	☒	✓	0.62	✓	4	–	Low Risk
Vanguard 500 Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VFIAX	Large Blend Index	-7.77 53 1,386	18.56 31 1,254	11.15 21 1,144	12.20 11 847	✓	19.23	1.00	6.93	✓	☒	✓	0.04	✓	3	1-Low	Low Risk
Fidelity® Contrafund® <i>percentile rank</i> <i># of funds in category</i>	FCNTX	Large Growth	-11.28 45 1,255	15.16 52 1,144	10.24 55 1,058	12.63 39 814	✓	21.10	0.91	32.56	✓	☒	✓	0.55	✓	2	1-Low	Low Risk
American Funds Washington Mutual R6 <i>percentile rank</i> <i># of funds in category</i>	RWMGX	Large Value	-5.32 23 1,386	18.12 49 1,254	9.96 55 1,144	11.34 47 847	✓	16.80	0.83	25.76	✓	☒	✖	0.26	✓	2	1-Low	Low Risk
Neuberger Berman Mid Cap Growth Inst <i>percentile rank</i> <i># of funds in category</i>	NBMLX	Mid-Cap Growth	-11.84 57 580	14.12 65 532	8.13 53 501	10.33 52 390	✓	22.56	0.96	3.21	✓	☒	✓	0.70	✓	3	–	Medium Risk
American Century Mid Cap Value I <i>percentile rank</i> <i># of funds in category</i>	AVUAX	Mid-Cap Value	-2.38 13 401	20.13 77 387	7.67 31 366	10.07 9 268	✓	17.24	0.84	19.01	✓	☒	✓	0.77	✓	4	1-Low	Medium Risk
MFS New Discovery R4 <i>percentile rank</i> <i># of funds in category</i>	MNDJX	Small Growth	-10.48 40 608	12.50 80 578	8.15 35 540	9.10 61 406	✓	23.69	0.95	9.25	✓	☒	✓	0.99	✓	4	–	Medium Risk
Delaware Small Cap Value Instl <i>percentile rank</i> <i># of funds in category</i>	DEVIX	Small Value	-10.81 81 482	21.64 75 453	4.55 68 430	7.65 49 323	✓	23.08	0.97	10.75	✓	☒	✓	0.86	✓	3	–	Medium Risk
Non-US Stock																		
American Funds New World R6 <i>percentile rank</i> <i># of funds in category</i>	RNWGX	Diversified Emerging Mkts	-6.90 24 839	12.18 22 750	4.10 3 658	5.50 1 398	✓	18.28	0.86	23.80	✓	☒	✓	0.57	✓	3	1-Low	Medium Risk
Vanguard Developed Markets Index Admiral <i>percentile rank</i> <i># of funds in category</i>	VTMGX	Foreign Large Blend Index	-2.91 58 763	13.85 25 711	3.42 34 643	5.24 23 436	✓	19.22	1.09	10.11	✓	☒	✓	0.07	✓	2	1-Low	Low Risk
Invesco Oppenheimer International Gr Y <i>percentile rank</i> <i># of funds in category</i>	OIGYX	Foreign Large Growth	-2.72 23 449	10.94 54 404	2.57 72 350	4.87 73 235	✓	21.70	1.11	27.03	✓	☒	✓	0.83	✓	3	–	Low Risk
Vanguard International Value Inv <i>percentile rank</i> <i># of funds in category</i>	VTRIX	Foreign Large Value	1.16 30 367	15.30 41 336	3.19 25 312	4.96 20 195	✓	19.28	1.02	12.85	✓	☒	✖	0.38	✓	2	–	Medium Risk
American Funds New Perspective R6 <i>percentile rank</i> <i># of funds in category</i>	RNPGX	Global Stock	-8.85 53 367	16.61 14 308	9.35 16 271	10.70 9 180	✓	21.06	1.14	22.34	✓	—	✓	0.41	✓	2	2-Basic	Low Risk

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			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	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated
Alternative																		
PIMCO Commodity Real Return Strat I2	PCRPX	Commodities Broad Basket	-14.92	25.61	6.61	-1.74	✔	18.28	1.12	4.41	✔	—	—	0.86	✔	3	—	—
<i>percentile rank</i>			87	36	31	68												
<i># of funds in category</i>			115	109	94	66									12-31-2022	—	—	
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	-20.10	9.83	5.82	5.79	✔	20.41	1.00	26.90	✔	—	✔	0.12	✔	3	1-Low	Low Risk
<i>percentile rank</i>			54	64	45	43												
<i># of funds in category</i>			261	237	213	155									02-28-2023	02-15-2022	12-31-2022	
Fixed Income																		
PIMCO International Bond (USD-Hdg) I-2	PFBPX	Global Bond	-3.78	-0.53	0.92	2.64	✔	4.61	0.62	8.52	✔	—	—	0.61	✔	3	—	—
<i>percentile rank</i>			20	21	11	4												
<i># of funds in category</i>			130	113	99	59									02-28-2023	—	—	
Eaton Vance Income Fund of Boston I	EIBIX	High Yield Bond	-1.32	6.64	3.53	4.11	✔	8.39	0.92	8.41	✔	—	—	0.75	✔	—	—	—
<i>percentile rank</i>			16	23	12	13												
<i># of funds in category</i>			689	622	580	415									—	—	—	
BlackRock Inflation Protected Bond Instl	BPRIX	Inflation-Protected Bond	-5.54	2.58	3.03	1.41	✔	7.39	1.04	6.13	✔	—	—	0.35	✔	3	—	—
<i>percentile rank</i>			45	38	18	30												
<i># of funds in category</i>			220	207	200	141									09-30-2022	—	—	
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	-4.67	-1.98	1.16	1.75	✔	6.54	1.04	22.52	✔	⚠	—	0.30	✔	3	1-Low	—
<i>percentile rank</i>			29	34	20	9												
<i># of funds in category</i>			476	429	393	296									02-28-2023	02-15-2022	—	
PIMCO Income I2	PONPX	Multisector Bond	-1.40	3.49	2.16	3.88	✔	6.04	0.86	16.01	✔	—	—	0.61	✔	—	—	—
<i>percentile rank</i>			17	44	26	1												
<i># of funds in category</i>			345	292	255	158									—	—	—	
Federated Hermes Govt Ultrashort IS	FGUSX	Ultrashort Bond	2.10	0.99	1.36	0.89	⊕	0.65	0.05	25.74	✔	—	—	0.26	✔	—	—	—
<i>percentile rank</i>			49	73	68	67												
<i># of funds in category</i>			237	216	180	106									—	—	—	
Target Date																		
Vanguard Target Retirement 2020 Fund	VTWNX	Target Date	-5.26	6.90	4.30	5.77	✔	10.66	0.89	10.11	✔	—	✔	0.08	✔	3	1-Low	—
<i>percentile rank</i>			29	53	42	25												
<i># of funds in category</i>			148	137	122	56									02-28-2023	02-15-2022	—	
Vanguard Target Retirement 2025 Fund	VTVX	Target Date	-5.91	8.31	4.77	6.35	✔	12.34	0.95	10.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
<i>percentile rank</i>			45	39	37	18												
<i># of funds in category</i>			235	209	185	117									02-28-2023	02-15-2022	12-31-2022	
Vanguard Target Retirement 2030 Fund	VTHRX	Target Date	-6.22	9.67	5.21	6.89	✔	13.51	0.96	10.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
<i>percentile rank</i>			40	50	40	26												
<i># of funds in category</i>			237	209	185	111									02-28-2023	02-15-2022	12-31-2022	
Vanguard Target Retirement 2035 Fund	VTHX	Target Date	-6.36	11.12	5.68	7.43	✔	14.54	0.95	10.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
<i>percentile rank</i>			35	57	45	31												
<i># of funds in category</i>			228	202	182	114									02-28-2023	02-15-2022	12-31-2022	

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																	Updated	Updated	Updated
Vanguard Target Retirement 2040 Fund	VFORX	Target Date	-6.53	12.58	6.12	7.91	✓	15.57	0.96	10.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			33	64	40	25													
<i># of funds in category</i>			232	203	185	111									02-28-2023	02-15-2022	12-31-2022		
Vanguard Target Retirement 2045 Fund	VTIVX	Target Date	-6.70	14.06	6.59	8.22	✓	16.65	0.98	10.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			36	46	32	18													
<i># of funds in category</i>			228	202	182	114									02-28-2023	02-15-2022	12-31-2022		
Vanguard Target Retirement 2050 Fund	VFIX	Target Date	-6.71	14.17	6.66	8.26	✓	16.89	0.98	10.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			34	49	34	20													
<i># of funds in category</i>			229	203	185	111									02-28-2023	02-15-2022	12-31-2022		
Vanguard Target Retirement 2055 Fund	VFFVX	Target Date	-6.67	14.17	6.66	8.24	✓	16.88	0.98	10.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			32	60	37	27													
<i># of funds in category</i>			226	200	182	96									02-28-2023	02-15-2022	12-31-2022		
Vanguard Target Retirement 2060 Fund	VTTX	Target Date	-6.67	14.16	6.65	8.24	✓	16.86	1.31	10.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			34	64	38	1													
<i># of funds in category</i>			225	194	171	8									02-28-2023	02-15-2022	12-31-2022		
Vanguard Target Retirement 2065 Fund	VLXVX	Target Date	-6.64	14.17	6.64	—	✖	16.86	1.31	5.72	✓	—	✓	0.08	✓	3	1-Low	Low Risk	
<i>percentile rank</i>			24	70	50	—													
<i># of funds in category</i>			173	80	10	—									02-28-2023	02-15-2022	12-31-2022		
Vanguard Target Retirement 2070 Fund	VSVNX	Target Date	—	—	—	—	—	—	—	0.76	✖	—	✓	0.08	✓	3	—	Low Risk	
<i>percentile rank</i>			—	—	—	—													
<i># of funds in category</i>			173	80	10	—									02-28-2023	—	12-31-2022		
Vanguard Target Retirement Income Fund	VTINX	Target Date	-4.50	3.83	3.26	3.79	✓	8.42	0.90	10.11	✓	—	✓	0.08	✓	3	1-Low	—	
<i>percentile rank</i>			39	53	35	39													
<i># of funds in category</i>			175	157	138	97									02-28-2023	02-15-2022	—		
Balanced																			
BlackRock Global Allocation Instl	MALOX	Global Allocation	-6.29	8.84	4.32	4.95	✓	13.48	1.00	6.25	✓	☒	✓	0.84	✓	3	—	Low Risk	
<i>percentile rank</i>			49	54	23	24													
<i># of funds in category</i>			406	389	365	261									02-28-2023	—	09-30-2022		