



# KUDZU FABRICS INC 401K AND PROFIT

## 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	Commit. Level	Carbon Risk	
																	Updated	Updated	Updated
<b>Alternative</b>																			
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		
<b>Fixed Income</b>																			
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									—	—	—		
PIMCO Real Return I2	PRLPX	Inflation-Protected Bond	-6.47	2.08	2.83	1.23	✔	7.34	1.03	4.22	✔	—	—	0.57	✔	3	—	—	
<i>percentile rank</i>			71	52	41	57													
<i># of funds in category</i>			220	207	200	141									02-28-2023	—	—		
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									—	—	—		
<b>Target Date</b>																			
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	—	
<b>Balanced</b>																		
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	Target Risk	-5.55	4.62	3.55	4.59	✓	10.13	1.02	1.09	✖	—	✓	0.12	✓	3	1-Low	—
<i>percentile rank</i>			50	80	38	24												
<i># of funds in category</i>			482	444	420	305									02-28-2023	02-15-2022	—	
Vanguard LifeStrategy Growth Inv	VASGX	Target Risk	-6.60	12.16	6.03	7.54	✓	15.48	1.02	1.09	✖	—	✓	0.14	✓	3	1-Low	Low Risk
<i>percentile rank</i>			48	56	35	27												
<i># of funds in category</i>			333	297	282	224									02-28-2023	02-15-2022	12-31-2022	
Vanguard LifeStrategy Income Inv	VASIX	Target Risk	-5.11	0.89	2.17	3.00	✓	7.72	1.00	1.09	✖	—	✓	0.11	✓	3	1-Low	—
<i>percentile rank</i>			63	84	54	41												
<i># of funds in category</i>			146	133	131	93									02-28-2023	02-15-2022	—	
Vanguard LifeStrategy Moderate Gr Inv	VSMGX	Target Risk	-6.05	8.35	4.82	6.09	✓	12.76	0.99	1.09	✖	—	✓	0.13	✓	3	1-Low	Low Risk
<i>percentile rank</i>			40	82	57	49												
<i># of funds in category</i>			752	685	658	487									02-28-2023	02-15-2022	12-31-2022	