

DIGITALGRID INC 401K PLAN

Screens Summary (Data as of 03-31-2024)

🔴 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 | Sustain. Rating | Commit. Level | Carbon Risk | |
| | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| US Stock | | | | | | | | | | | | | | | | | | |
| DFA US Core Equity 1 I | DFEOX | Large Blend | 28.49 | 10.50 | 14.42 | 11.80 | ✔️ | 17.54 | 0.98 | 12.10 | ✔️ | 🇺🇸 | ✔️ | 0.15 | ✔️ | 2 | - | Medium Risk |
| <i>percentile rank</i> | | | 53 | 44 | 42 | 49 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 1,591 | 1,449 | 1,319 | 995 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Vanguard 500 Index Admiral | VFIAX | Large Blend Index | 29.83 | 11.44 | 15.01 | 12.92 | ✔️ | 17.60 | 1.00 | 6.34 | ✔️ | 🇺🇸 | ✔️ | 0.04 | ✔️ | 3 | 1-Low | Low Risk |
| <i>percentile rank</i> | | | 34 | 24 | 23 | 9 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 1,591 | 1,449 | 1,319 | 995 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| JPMorgan Large Cap Growth R6 | JLGMX | Large Growth | 43.55 | 11.52 | 20.51 | 17.56 | ✔️ | 19.79 | 0.92 | 19.67 | ✔️ | 🇺🇸 | ✔️ | 0.44 | ✔️ | 3 | 2-Basic | Low Risk |
| <i>percentile rank</i> | | | 19 | 19 | 3 | 3 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 1,293 | 1,207 | 1,129 | 887 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Invesco Growth and Income R6 | GIFFX | Large Value | 25.56 | 10.20 | 11.80 | 9.50 | ✔️ | 17.18 | 1.02 | 21.10 | ✔️ | 🇺🇸 | ✔️ | 0.42 | ✔️ | 2 | - | Medium Risk |
| <i>percentile rank</i> | | | 19 | 28 | 33 | 36 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 1,284 | 1,197 | 1,134 | 887 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Vanguard Mid-Cap Growth Index Admiral | VMGMX | Mid-Cap Growth | 21.80 | 3.89 | 11.32 | 10.63 | ✔️ | 21.83 | 1.00 | 2.70 | ❌ | 🇺🇸 | ✔️ | 0.07 | ✔️ | 4 | 1-Low | Medium Risk |
| <i>percentile rank</i> | | | 60 | 32 | 44 | 41 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 599 | 566 | 534 | 431 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Vanguard Mid-Cap Value Index Admiral | VMVAX | Mid-Cap Value | 19.10 | 7.37 | 10.17 | 8.93 | ✔️ | 18.46 | 0.95 | 2.70 | ❌ | 🇺🇸 | ✔️ | 0.07 | ✔️ | 4 | 1-Low | Medium Risk |
| <i>percentile rank</i> | | | 62 | 61 | 54 | 32 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 428 | 408 | 389 | 307 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| State St Russell Sm Cap® Gr Indx NL CI C | | Small Growth | 20.28 | -2.82 | 7.22 | 7.76 | ✔️ | 22.39 | 1.00 | 14.58 | ✔️ | 🇺🇸 | ✔️ | 0.05 | ✔️ | 3 | - | Medium Risk |
| <i>percentile rank</i> | | | 38 | 65 | 76 | 76 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 617 | 583 | 548 | 429 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| State St Russell Sm Cp® Val Indx NL CI C | | Small Value | 18.60 | 2.14 | 8.17 | 6.85 | ✔️ | 21.50 | 1.00 | 14.58 | ✔️ | 🇺🇸 | ✔️ | 0.05 | ✔️ | 2 | - | Medium Risk |
| <i>percentile rank</i> | | | 64 | 92 | 82 | 58 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 510 | 476 | 443 | 352 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Non-US Stock | | | | | | | | | | | | | | | | | | |
| American Funds New World R6 | RNWXG | Diversified Emerging Mkts | 14.64 | -0.07 | 7.22 | 5.99 | ✔️ | 16.28 | 0.81 | 24.81 | ✔️ | 🇺🇸 | ✔️ | 0.57 | ✔️ | 3 | 1-Low | Medium Risk |
| <i>percentile rank</i> | | | 24 | 25 | 10 | 2 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 840 | 743 | 680 | 450 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| American Funds Intl Gr and Inc R6 | RIGGX | Foreign Large Blend | 13.88 | 2.99 | 7.28 | 4.44 | ✔️ | 16.82 | 1.00 | 15.51 | ✔️ | 🇺🇸 | ✔️ | 0.54 | ✔️ | 2 | 1-Low | Low Risk |
| <i>percentile rank</i> | | | 49 | 55 | 35 | 53 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 839 | 780 | 714 | 468 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Vanguard Developed Markets Index Admiral | VTMGX | Foreign Large Blend Index | 14.87 | 3.94 | 7.36 | 5.01 | ✔️ | 17.90 | 1.08 | 11.11 | ✔️ | 🇺🇸 | ✔️ | 0.07 | ✔️ | 2 | 1-Low | Low Risk |
| <i>percentile rank</i> | | | 35 | 37 | 33 | 24 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 839 | 780 | 714 | 468 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Invesco Oppenheimer International Gr R6 | OIGIX | Foreign Large Growth | 14.45 | 0.88 | 7.82 | 4.57 | ✔️ | 21.50 | 1.20 | 28.04 | ✔️ | 🇺🇸 | ✔️ | 0.73 | ✔️ | 4 | - | Low Risk |
| <i>percentile rank</i> | | | 37 | 46 | 40 | 74 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 441 | 413 | 355 | 248 | | | | | | | | | | | | |
| <hr/> | | | | | | | | | | | | | | | | | | |
| Vanguard International Value Inv | VTRIX | Foreign Large Value | 11.17 | 2.91 | 6.68 | 4.20 | ✔️ | 17.22 | 0.97 | 13.85 | ✔️ | 🇺🇸 | ❌ | 0.39 | ✔️ | 3 | - | Medium Risk |
| <i>percentile rank</i> | | | 74 | 80 | 46 | 32 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 391 | 356 | 331 | 216 | | | | | | | | | | | | |

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DIGITALGRID INC 401K PLAN

Screens Summary (Data as of 03-31-2024)

🔴 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 | Sustain. Rating | Commit. Level | Carbon Risk | |
| American Funds New Perspective R6 | RNPGX | Global Stock | 22.92 | 5.22 | 12.78 | 10.96 | ✔️ | 18.68 | 1.10 | 23.35 | ✔️ | — | ✔️ | 0.42 | ✔️ | 3 | 2-Basic | Low Risk |
| <i>percentile rank</i> | | | 51 | 40 | 24 | 16 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 364 | 330 | 287 | 194 | | | | | | | | | 02-29-2024 | 02-15-2022 | 12-31-2022 | |

| Alternative | | | | | | | | | | | | | | | | | | |
|--------------------------------------|-------|--------------------------|-------|------|------|-------|----|-------|------|-------|----|---|----|------|------------|------------|------------|----------|
| PIMCO Commodity Real Ret Strat Instl | PCRIX | Commodities Broad Basket | -1.16 | 8.24 | 7.35 | -1.11 | ✔️ | 17.75 | 1.10 | 5.42 | ✔️ | — | — | 0.99 | ✔️ | 3 | — | — |
| <i>percentile rank</i> | | | 72 | 76 | 46 | 58 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 114 | 108 | 103 | 67 | | | | | | | | | 02-29-2024 | — | — | |
| Vanguard Real Estate Index Admiral | VGSLX | Real Estate | 8.54 | 1.74 | 3.71 | 6.22 | ✔️ | 21.76 | 1.02 | 27.90 | ✔️ | — | ✔️ | 0.12 | ✔️ | 3 | 1-Low | Low Risk |
| <i>percentile rank</i> | | | 49 | 68 | 48 | 48 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 276 | 261 | 240 | 180 | | | | | | | | | 02-29-2024 | 02-15-2022 | 12-31-2022 | |

| Fixed Income | | | | | | | | | | | | | | | | | | |
|--|-------|--------------------------|------|-------|-------|------|----|------|-------|-------|----|----|---|------|------------|------------|-------|---|
| Baird Core Plus Bond Inst | BCOIX | Core Plus Bond | 3.56 | -1.71 | 1.23 | 2.29 | ✔️ | 7.25 | 0.99 | 23.52 | ✔️ | — | — | 0.30 | ✔️ | 3 | 1-Low | — |
| <i>percentile rank</i> | | | 29 | 23 | 25 | 15 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 682 | 611 | 577 | 404 | | | | | | | | | 02-29-2024 | 02-15-2022 | — | |
| PIMCO International Bond (USD-Hdg) Instl | PFORX | Global Bond | 7.73 | -0.14 | 1.68 | 3.31 | ✔️ | 4.97 | 0.58 | 9.52 | ✔️ | — | — | 0.63 | ✔️ | 3 | — | — |
| <i>percentile rank</i> | | | 12 | 3 | 12 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 113 | 109 | 101 | 62 | | | | | | | | | 02-29-2024 | — | — | |
| Eaton Vance Income Fund of Boston R6 | EIBRX | High Yield Bond | 9.52 | 3.34 | 4.52 | — | ✔️ | 7.91 | 0.93 | 9.41 | ✔️ | — | — | 0.66 | ✔️ | — | — | — |
| <i>percentile rank</i> | | | 71 | 17 | 21 | — | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 696 | 633 | 601 | 457 | | | | | | | | | | | | |
| Vanguard Inflation-Protected Secs Adm | VAIPX | Inflation-Protected Bond | 0.14 | -0.72 | 2.34 | 2.11 | ✔️ | 7.08 | 0.99 | 2.39 | ⚠️ | — | — | 0.10 | ✔️ | 3 | — | — |
| <i>percentile rank</i> | | | 68 | 61 | 61 | 21 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 236 | 222 | 214 | 156 | | | | | | | | | 02-29-2024 | — | — | |
| ⚠️ Western Asset Core Bond IS | WACSX | Intermediate-Term Bond | 1.37 | -3.75 | -0.15 | 1.77 | ✔️ | 9.00 | 1.24 | 17.27 | ✔️ | 🇺🇸 | — | 0.42 | ✔️ | 3 | — | — |
| <i>percentile rank</i> | | | 81 | 97 | 85 | 19 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 557 | 503 | 452 | 322 | | | | | | | | | 02-29-2024 | — | — | |
| Lincoln Stable Value Account -LNGPA | | Stable Value | — | — | — | — | — | — | — | 40.94 | ✔️ | — | — | — | — | — | — | |
| <i>percentile rank</i> | | | — | — | — | — | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 43 | — | — | — | | | | | | | | | | | | |
| PIMCO Short-Term Instl | PTSHX | Ultrashort Bond | 6.93 | 2.48 | 2.42 | 2.14 | ✔️ | 1.31 | -0.01 | 13.25 | ✔️ | — | — | 0.47 | ✔️ | 3 | — | — |
| <i>percentile rank</i> | | | 17 | 47 | 26 | 9 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 249 | 214 | 194 | 122 | | | | | | | | | 01-31-2024 | — | — | |

| Target Date | | | | | | | | | | | | | | | | | | |
|---|-------|-------------|------|------|------|------|----|------|------|-------|----|---|----|------|------------|---|---|---|
| American Funds 2010 Trgt Date Retire R6 | RFTTX | Target Date | 8.93 | 2.81 | 5.44 | 5.19 | ✔️ | 8.80 | 0.89 | 12.25 | ✔️ | — | ⚠️ | 0.29 | ✔️ | 3 | — | — |
| <i>percentile rank</i> | | | 43 | 1 | 6 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 127 | 115 | 107 | 56 | | | | | | | | | 02-29-2024 | — | — | |
| American Funds 2015 Trgt Date Retire R6 | RFJTX | Target Date | 9.77 | 2.95 | 5.80 | 5.52 | ✔️ | 9.44 | 0.87 | 12.25 | ✔️ | — | ✔️ | 0.30 | ✔️ | 2 | — | — |
| <i>percentile rank</i> | | | 43 | 1 | 6 | 3 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 125 | 118 | 100 | 53 | | | | | | | | | 02-29-2024 | — | — | |

DIGITALGRID INC 401K PLAN

Screens Summary (Data as of 03-31-2024)

⊖ 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 | Sustain. Rating | Commit. Level | Carbon Risk | |
| | | | | | | | | | | | | | | Updated | Updated | Updated | | |
| American Funds 2020 Trgt Date Retire R6 | RRCTX | Target Date | 10.75 | 3.17 | 6.19 | 5.95 | ✔ | 9.97 | 0.84 | 12.25 | ✔ | — | ✔ | 0.31 | ✔ | 3 | — | — |
| <i>percentile rank</i> | | | 51 | 2 | 10 | 3 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 172 | 158 | 138 | 77 | | | | | | | | | 02-29-2024 | — | — | |
| American Funds 2025 Trgt Date Retire R6 | RFDTX | Target Date | 12.08 | 3.35 | 7.02 | 6.64 | ✔ | 10.77 | 0.85 | 12.25 | ✔ | — | ✔ | 0.32 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 44 | 2 | 6 | 5 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 275 | 258 | 212 | 131 | | | | | | | | | 02-29-2024 | — | 06-30-2022 | |
| American Funds 2030 Trgt Date Retire R6 | RFETX | Target Date | 14.83 | 4.11 | 8.05 | 7.58 | ✔ | 12.06 | 0.88 | 12.25 | ✔ | — | ✔ | 0.33 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 22 | 6 | 7 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 267 | 251 | 206 | 136 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2035 Trgt Date Retire R6 | RFFTX | Target Date | 17.93 | 5.01 | 9.45 | 8.61 | ✔ | 13.53 | 0.93 | 12.25 | ✔ | — | ✔ | 0.35 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 13 | 8 | 1 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 269 | 241 | 206 | 129 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2040 Trgt Date Retire R6 | RFCTX | Target Date | 21.05 | 5.83 | 10.37 | 9.17 | ✔ | 14.83 | 0.96 | 12.25 | ✔ | — | ✔ | 0.37 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 7 | 8 | 4 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 261 | 245 | 206 | 133 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2045 Trgt Date Retire R6 | RFHTX | Target Date | 21.98 | 5.96 | 10.58 | 9.35 | ✔ | 15.27 | 0.95 | 12.25 | ✔ | — | ✔ | 0.37 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 13 | 14 | 10 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 262 | 244 | 208 | 126 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2050 Trgt Date Retire R6 | RFITX | Target Date | 22.57 | 5.90 | 10.64 | 9.41 | ✔ | 15.55 | 0.95 | 12.25 | ✔ | — | ✔ | 0.38 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 13 | 26 | 5 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 258 | 243 | 209 | 134 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2055 Trgt Date Retire R6 | RFKTX | Target Date | 23.12 | 5.87 | 10.61 | 9.39 | ✔ | 15.80 | 0.96 | 12.25 | ✔ | — | ✔ | 0.38 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 11 | 32 | 12 | 1 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 257 | 240 | 207 | 122 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2060 Trgt Date Retire R6 | RFUTX | Target Date | 23.31 | 5.86 | 10.60 | — | ✔ | 15.82 | 1.25 | 9.02 | ✔ | — | ✔ | 0.39 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 10 | 38 | 19 | — | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 254 | 236 | 187 | 11 | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |
| American Funds 2065 Trgt Date Retire R6 | RFVTX | Target Date | 23.25 | 5.86 | — | — | ✔ | 15.83 | 1.25 | 4.25 | ✔ | — | ✔ | 0.39 | ✔ | 3 | — | Low Risk |
| <i>percentile rank</i> | | | 10 | 40 | — | — | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 246 | 170 | 11 | — | | | | | | | | | 02-29-2024 | — | 12-31-2022 | |

Balanced

| | | | | | | | | | | | | | | | | | | |
|---------------------------------------|-------|-------------|-------|-------|------|------|---|-------|------|------|---|---|---|------|---|------------|------------|------------|
| Vanguard LifeStrategy Cnsv Gr Inv | VSCGX | Target Risk | 10.23 | 1.29 | 4.70 | 4.85 | ✔ | 10.14 | 1.03 | 2.10 | ✖ | — | ✔ | 0.12 | ✔ | 3 | 1-Low | — |
| <i>percentile rank</i> | | | 43 | 62 | 51 | 25 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 530 | 506 | 473 | 350 | | | | | | | | | | 02-29-2024 | 07-19-2023 | — |
| Vanguard LifeStrategy Growth Inv | VASGX | Target Risk | 18.37 | 4.75 | 8.92 | 7.81 | ✔ | 14.51 | 1.02 | 2.10 | ✖ | — | ✔ | 0.14 | ✔ | 3 | 1-Low | Low Risk |
| <i>percentile rank</i> | | | 42 | 51 | 33 | 26 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 362 | 350 | 320 | 262 | | | | | | | | | | 02-29-2024 | 07-19-2023 | 12-31-2022 |
| Vanguard LifeStrategy Income Inv | VASIX | Target Risk | 6.26 | -0.49 | 2.49 | 3.25 | ✔ | 8.20 | 1.02 | 2.10 | ✖ | — | ✔ | 0.11 | ✔ | 4 | 1-Low | — |
| <i>percentile rank</i> | | | 68 | 83 | 68 | 46 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 180 | 162 | 155 | 119 | | | | | | | | | | 02-29-2024 | 07-19-2023 | — |
| Vanguard LifeStrategy Mod Gr Inv Shrs | VSMGX | Target Risk | 14.24 | 3.02 | 6.83 | 6.36 | ✔ | 12.29 | 1.00 | 2.10 | ✖ | — | ✔ | 0.13 | ✔ | 3 | 1-Low | Low Risk |
| <i>percentile rank</i> | | | 57 | 71 | 64 | 51 | | | | | | | | | | | | |
| <i># of funds in category</i> | | | 881 | 828 | 781 | 581 | | | | | | | | | | 02-29-2024 | 07-19-2023 | 12-31-2022 |