

# LOS ANGELES CENTER FOR LAW AND

## 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	Pass/ Fail	Sustain. Rating <i>Updated</i>	Commit. Level <i>Updated</i>	Carbon Risk <i>Updated</i>
<b>US Stock</b>																		
JPMorgan US Equity R6	JUEMX	Large Blend	31.64	12.03	16.95	13.57	✔️	17.55	0.99	9.62	✔️	🗄️	✖️	0.44	✔️	3	2-Basic	Low Risk
<i>percentile rank</i>			18	15	2	2												
<i># of funds in category</i>			1,591	1,449	1,319	995									02-29-2024	03-11-2022	12-31-2022	
Fidelity U.S. Sustainability Index	FITLX	Large Blend Index	33.35	12.24	15.76	–	✔️	18.24	1.03	6.90	✔️	🗄️	✖️	0.11	✔️	5	2-Basic	Low Risk
<i>percentile rank</i>			12	12	10	–												
<i># of funds in category</i>			1,591	1,449	1,319	995									02-29-2024	02-15-2022	12-31-2022	
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									02-29-2024	04-07-2022	12-31-2022	
Vanguard Equity-Income Adm	VEIRX	Large Value	18.68	9.87	11.17	10.27	✔️	15.29	0.92	3.09	✔️	🗄️	✔️	0.18	✔️	2	–	Medium Risk
<i>percentile rank</i>			68	35	44	19												
<i># of funds in category</i>			1,284	1,197	1,134	887									02-29-2024	–	12-31-2022	
Baron Growth R6	BGRUX	Mid-Cap Growth	12.46	3.87	11.69	–	✔️	20.45	0.89	29.27	✔️	🗄️	✔️	1.05	✔️	4	–	Low Risk
<i>percentile rank</i>			95	33	32	–												
<i># of funds in category</i>			599	566	534	431									02-29-2024	–	12-31-2022	
Allspring Special Mid Cap Value R6	WFPRX	Mid-Cap Value	18.66	9.79	12.21	9.87	✔️	17.22	0.87	15.20	✔️	🗄️	✔️	0.70	✔️	3	–	Medium Risk
<i>percentile rank</i>			66	23	24	10												
<i># of funds in category</i>			428	408	389	307									02-29-2024	–	12-31-2022	
PGIM Jennison Small Company R6	PJSQX	Small Growth	16.08	4.25	12.48	9.76	✔️	19.44	0.81	10.35	✔️	🗄️	✖️	0.69	✔️	4	–	Medium Risk
<i>percentile rank</i>			63	8	11	28												
<i># of funds in category</i>			617	583	548	429									02-29-2024	–	12-31-2022	
DFA US Small Cap Value I	DFS VX	Small Value	24.90	10.01	12.79	8.39	✔️	21.07	0.96	12.10	✔️	🗄️	✔️	0.31	✔️	2	–	Medium Risk
<i>percentile rank</i>			20	11	17	20												
<i># of funds in category</i>			510	476	443	352									02-29-2024	–	12-31-2022	
<b>Non-US Stock</b>																		
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									02-29-2024	02-15-2022	12-31-2022	
Hartford Schroders International Stk SDR	SCIJX	Foreign Large Blend	10.94	2.26	9.44	–	✔️	18.04	1.06	14.09	✔️	🗄️	✖️	0.69	✔️	4	–	Low Risk
<i>percentile rank</i>			79	65	5	–												
<i># of funds in category</i>			839	780	714	468									02-29-2024	–	12-31-2022	
Fidelity Intl Sustainability Idx	FNIDX	Foreign Large Blend Index	10.81	0.16	5.56	–	✔️	17.65	1.06	6.90	✔️	🗄️	✔️	0.20	✔️	3	–	Low Risk
<i>percentile rank</i>			80	90	76	–												
<i># of funds in category</i>			839	780	714	468									02-29-2024	–	12-31-2022	
Vanguard International Growth Adm	VWILX	Foreign Large Growth	7.46	-5.68	8.70	7.73	✔️	22.89	1.21	14.27	✔️	🗄️	✔️	0.31	✔️	3	–	Low Risk
<i>percentile rank</i>			84	91	28	11												
<i># of funds in category</i>			441	413	355	248									02-29-2024	–	12-31-2022	
Schwab Fdmtl Intl Lg Co Idx	SFNNX	Foreign Large Value	17.48	6.94	8.52	5.12	✔️	17.21	0.97	6.93	✔️	🗄️	✔️	0.25	✔️	1	–	Medium Risk
<i>percentile rank</i>			23	23	15	7												
<i># of funds in category</i>			391	356	331	216									02-29-2024	–	12-31-2022	

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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	—	—	
Neuberger Berman Real Estate R6	NRREX	Real Estate	5.99	1.28	4.64	6.94	✔️	21.44	1.00	18.26	✔️	—	✔️	0.76	✔️	3	—	Low Risk
<i>percentile rank</i>			77	75	23	18												
<i># of funds in category</i>			276	261	240	180									02-29-2024	—	12-31-2022	

Fixed Income																		
American Funds Strategic Bond R-6	RANGX	Core Plus Bond	-3.63	-3.36	1.51	—	✔️	7.69	1.02	8.04	✔️	—	—	0.32	✔️	3	—	—
<i>percentile rank</i>			100	90	13	—												
<i># of funds in category</i>			682	611	577	404									02-29-2024	—	—	
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	—	—	
American Funds American High-Inc R6	RITGX	High Yield Bond	11.85	3.62	5.09	4.46	✔️	7.91	0.93	20.35	✔️	—	—	0.32	✔️	1	1-Low	—
<i>percentile rank</i>			16	10	9	12												
<i># of funds in category</i>			696	633	601	457									02-29-2024	02-15-2022	—	
American Funds Inflation Linked Bd R6	RILFX	Inflation-Protected Bond	-1.64	-1.64	2.23	2.23	✔️	7.30	1.01	10.42	✔️	—	—	0.29	✔️	3	—	—
<i>percentile rank</i>			88	87	72	6												
<i># of funds in category</i>			236	222	214	156									02-29-2024	—	—	
American Funds Bond Fund of Amer R6	RBFGX	Intermediate-Term Bond	1.40	-2.19	1.22	2.02	✔️	7.20	0.99	15.09	✔️	🇺🇸	—	0.24	✔️	4	1-Low	—
<i>percentile rank</i>			80	27	7	6												
<i># of funds in category</i>			557	503	452	322									02-29-2024	02-15-2022	—	
Lincoln Stable Value Account -LNGPA		Stable Value	—	—	—	—	—	—	—	40.94	✔️	—	—	—	—	—	—	—
<i>percentile rank</i>			—	—	—	—												
<i># of funds in category</i>			43	—	—	—												
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	5.91	2.70	2.38	1.84	✔️	0.88	0.05	10.25	✔️	—	—	0.15	✔️	3	1-Low	—
<i>percentile rank</i>			48	30	28	32												
<i># of funds in category</i>			249	214	194	122									02-29-2024	02-15-2022	—	

Balanced																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	18.11	6.21	8.91	8.37	✔️	12.03	0.97	25.26	✔️	—	✔️	0.25	✔️	2	1-Low	Low Risk
<i>percentile rank</i>			18	12	21	11												
<i># of funds in category</i>			881	828	781	581									02-29-2024	02-15-2022	12-31-2022	