

MURRAY EQUIPMENT INC 401K SALARY

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																		
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
percentile rank			18	15	2	2												
# of funds in category			1,591	1,449	1,319	995												

Fidelity 500 Index	FXAIX	Large Blend Index	29.87	11.48	15.04	12.95	✔️	17.59	1.00	15.17	✔️	🏠	✔️	0.02	✔️	3	1-Low	Low Risk
percentile rank			32	22	21	8												
# of funds in category			1,591	1,449	1,319	995												

State St Russell Lg Cap Gr® Indx NL Cl C		Large Growth	38.97	12.45	18.47	15.93	—	21.06	1.00	24.76	✔️	🏠	✔️	0.04	✔️	3	—	Low Risk
percentile rank			—	—	—	—												
# of funds in category			1,293	1,207	1,129	887												

Vanguard Value Index Adm	VVIAX	Large Value	21.09	10.19	11.53	10.44	✔️	15.62	0.94	29.27	✔️	🏠	✔️	0.05	✔️	3	1-Low	Medium Risk
percentile rank			47	28	37	16												
# of funds in category			1,284	1,197	1,134	887												

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
percentile rank			60	32	44	41												
# of funds in category			599	566	534	431												

Vanguard Selected Value Inv	VASVX	Mid-Cap Value	29.34	11.29	14.15	9.37	✔️	20.10	1.01	19.11	✔️	🏠	✔️	0.43	✔️	4	—	Medium Risk
percentile rank			9	12	11	19												
# of funds in category			428	408	389	307												

Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	21.19	-1.09	8.32	8.52	✔️	22.18	0.98	19.26	✔️	🏠	✔️	0.07	✔️	4	1-Low	Medium Risk
percentile rank			32	51	57	55												
# of funds in category			617	583	548	429												

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
percentile rank			20	11	17	20												
# of funds in category			510	476	443	352												

Non-US Stock																		
American Funds New World R6	RNWGX	Diversified Emerging Mkts	14.64	-0.07	7.22	5.99	✔️	16.28	0.81	24.81	✔️	🏠	✔️	0.57	✔️	3	1-Low	Medium Risk
percentile rank			24	25	10	2												
# of funds in category			840	743	680	450												

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
percentile rank			49	55	35	53												
# of funds in category			839	780	714	468												

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
percentile rank			35	37	33	24												
# of funds in category			839	780	714	468												

MFS International Equity R6	MIEIX	Foreign Large Growth	13.40	6.55	9.40	6.83	✔️	17.31	1.01	14.51	✔️	🏠	✔️	0.68	✔️	4	2-Basic	Low Risk
percentile rank			55	5	5	6												
# of funds in category			839	780	714	468												

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
percentile rank			23	23	15	7												
# of funds in category			391	356	331	216												

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Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	22.71	6.59	10.88	—	✔️	16.84	1.01	11.11	✔️	—	✔️	0.10	✔️	2	1-Low	Low Risk
<i>percentile rank</i>			38	49	33	—												
<i># of funds in category</i>			368	352	314	211									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	—	—	
DFA Real Estate Securities I	DFREX	Real Estate	7.83	2.54	3.96	6.85	✔️	21.32	1.00	12.10	✔️	—	✔️	0.18	✔️	3	—	Low Risk
<i>percentile rank</i>			58	42	41	22												
<i># of funds in category</i>			276	261	240	180									02-29-2024	—	12-31-2022	

Fixed Income

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	—	—	
⚠️ Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	9.11	2.11	3.85	4.23	✔️	8.27	0.97	1.59	✖️	—	—	0.13	✔️	2	—	—
<i>percentile rank</i>			79	46	44	18												
<i># of funds in category</i>			696	633	601	457									02-29-2024	—	—	
DFA Inflation-Protected Securities I	DIPSX	Inflation-Protected Bond	0.14	-0.69	2.39	2.23	✔️	7.78	1.08	17.55	✔️	—	—	0.11	✔️	3	—	—
<i>percentile rank</i>			68	59	52	8												
<i># of funds in category</i>			236	222	214	156									02-29-2024	—	—	
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	2.80	-2.17	0.81	1.97	✔️	7.37	1.01	23.52	✔️	📊	—	0.30	✔️	4	1-Low	—
<i>percentile rank</i>			21	26	22	10												
<i># of funds in category</i>			557	503	452	322									02-29-2024	02-15-2022	—	
PIMCO Income Instl	PIMIX	Multisector Bond	8.05	1.64	3.07	4.27	✔️	6.30	0.81	17.02	✔️	—	—	0.62	✔️	4	—	—
<i>percentile rank</i>			36	20	25	1												
<i># of funds in category</i>			362	325	279	184									02-29-2024	—	—	
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	