

PEOPLE DRIVEN CREDIT UNION 401K

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 Updated	Commit. Level Updated	Carbon Risk Updated	
Alternative																		
PIMCO Commodity Real Return Strat I2	PCRPX	Commodities Broad Basket	-1.20	8.14	7.24	-1.19	✔️	17.74	1.11	5.42	✔️	—	—	1.09	✔️	3	—	—
<i>percentile rank</i>			75	78	47	59												
<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) I-2	PFBPX	Global Bond	7.63	-0.24	1.58	3.21	✔️	4.97	0.58	9.52	✔️	—	—	0.73	✔️	3	—	—
<i>percentile rank</i>			13	7	14	3												
<i># of funds in category</i>			113	109	101	62									02-29-2024	—	—	
Eaton Vance Income Fund of Boston I	EIBIX	High Yield Bond	9.42	3.24	4.42	4.31	✔️	7.87	0.92	9.41	✔️	—	—	0.75	✔️	—	—	—
<i>percentile rank</i>			73	19	23	15												
<i># of funds in category</i>			696	633	601	457												
American Century Inflation Adjs Bond R5	AIANX	Inflation-Protected Bond	-0.33	-0.71	2.25	1.93	✔️	7.33	1.02	22.35	✔️	—	—	0.31	✔️	3	—	—
<i>percentile rank</i>			80	60	68	47												
<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	—	
Federated Hermes Govt Ultrashort IS	FGUSX	Ultrashort Bond	5.34	2.29	2.01	1.41	⚠️	0.94	0.06	26.74	✔️	—	—	0.26	✔️	—	—	—
<i>percentile rank</i>			76	65	70	71												
<i># of funds in category</i>			249	214	194	122												
Balanced																		
Vanguard LifeStrategy Cnsvr 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	