

# CYPRESS HILLS CEMETERY SECTION

## Screens Summary (Data as of 03-31-2025)

⊖ Fund Removed from Approved List    ⚠ Fund on Watch List

|                                          |        |                           | Trailing Performance and Risk |       |       |       |               |                   |                | Management |               |              | Style         |              | Expense       |                    | ESG Metrics      |                |  |
|------------------------------------------|--------|---------------------------|-------------------------------|-------|-------|-------|---------------|-------------------|----------------|------------|---------------|--------------|---------------|--------------|---------------|--------------------|------------------|----------------|--|
| Name                                     | Ticker | Asset Class               | 1 Yr                          | 3 Yr  | 5 Yr  | 10 Yr | Pass/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |  |
|                                          |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| US Stock                                 |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| DFA US Core Equity 1 I                   | DFOEX  | Large Blend               | 5.26                          | 8.28  | 18.99 | 11.24 | ✓             | 17.86             | 1.02           | 13.10      | ✓             | ☐            | ✓             | 0.15         | ✓             | 2                  | —                | Medium Risk    |  |
| percentile rank                          |        |                           | 64                            | 47    | 14    | 52    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 1,457                         | 1,331 | 1,218 | 912   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Vanguard 500 Index Admiral               | VFIAX  | Large Blend Index         | 8.21                          | 9.02  | 18.55 | 12.46 | ✓             | 17.31             | 1.00           | 7.34       | ✓             | ☐            | ✓             | 0.04         | ✓             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                          |        |                           | 20                            | 24    | 24    | 8     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 1,457                         | 1,331 | 1,218 | 912   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| JPMorgan Large Cap Growth R6             | JLGMX  | Large Growth              | 6.59                          | 11.64 | 21.29 | 16.41 | ✓             | 19.49             | 0.94           | 20.67      | ✓             | ☐            | ✓             | 0.44         | ✓             | 2                  | 2-Basic          | Low Risk       |  |
| percentile rank                          |        |                           | 32                            | 5     | 4     | 4     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 1,103                         | 1,052 | 972   | 759   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 04-07-2022       | 12-31-2022     |  |
| Vanguard Equity-Income Adm               | VEIRX  | Large Value               | 9.77                          | 8.04  | 16.52 | 10.37 | ✓             | 15.33             | 0.89           | 4.09       | ✓             | ☐            | ✓             | 0.18         | ✓             | 2                  | —                | Medium Risk    |  |
| percentile rank                          |        |                           | 17                            | 32    | 52    | 14    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 1,175                         | 1,109 | 1,049 | 824   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Vanguard Mid-Cap Growth Index Admiral    | VMGMX  | Mid-Cap Growth            | 4.49                          | 3.95  | 14.82 | 9.37  | ✓             | 21.38             | 0.96           | 2.12       | ✗             | ☐            | ✓             | 0.07         | ✓             | 4                  | 1-Low            | Medium Risk    |  |
| percentile rank                          |        |                           | 7                             | 23    | 18    | 30    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 509                           | 493   | 459   | 369   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Allspring Special Mid Cap Value R6       | WFPRX  | Mid-Cap Value             | 0.67                          | 5.58  | 17.53 | 8.67  | ✓             | 17.44             | 0.86           | 16.20      | ✓             | ☐            | ✓             | 0.70         | ✓             | 4                  | —                | Medium Risk    |  |
| percentile rank                          |        |                           | 52                            | 33    | 47    | 21    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 424                           | 397   | 373   | 285   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Vanguard Small Cap Growth Index Admiral  | VSGAX  | Small Growth              | -2.83                         | 1.18  | 11.47 | 7.30  | ✓             | 23.14             | 0.95           | 20.26      | ✓             | ☐            | ✓             | 0.07         | ✓             | 4                  | 1-Low            | Medium Risk    |  |
| percentile rank                          |        |                           | 32                            | 37    | 58    | 50    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 559                           | 543   | 528   | 398   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| DFA US Small Cap Value I                 | DFS VX | Small Value               | -4.18                         | 4.92  | 22.03 | 7.43  | ✓             | 23.62             | 0.98           | 13.10      | ✓             | ☐            | ✓             | 0.31         | ✓             | 3                  | —                | Medium Risk    |  |
| percentile rank                          |        |                           | 60                            | 22    | 16    | 24    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 503                           | 482   | 456   | 365   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Non-US Stock                             |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| American Funds New World R6              | RNWGX  | Diversified Emerging Mkts | 3.31                          | 3.31  | 10.83 | 6.44  | ✓             | 15.36             | 0.78           | 25.81      | ✓             | ☐            | ✓             | 0.57         | ✓             | 3                  | 1-Low            | Medium Risk    |  |
| percentile rank                          |        |                           | 68                            | 25    | 24    | 3     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 787                           | 724   | 646   | 439   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| MFS Research International R6            | MRSKX  | Foreign Large Blend       | 3.37                          | 3.97  | 9.95  | 5.38  | ✓             | 16.80             | 1.01           | 2.25       | ✗             | ☐            | ✓             | 0.63         | ✓             | 3                  | 2-Basic          | Low Risk       |  |
| percentile rank                          |        |                           | 85                            | 83    | 81    | 47    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 761                           | 706   | 662   | 445   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Vanguard Developed Markets Index Admiral | VTMGX  | Foreign Large Blend Index | 4.73                          | 5.31  | 12.15 | 5.60  | ✓             | 17.95             | 1.09           | 12.11      | ✓             | ☐            | ✓             | 0.05         | ✓             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                          |        |                           | 75                            | 56    | 36    | 33    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 761                           | 706   | 662   | 445   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Vanguard International Growth Adm        | VWILX  | Foreign Large Growth      | 5.46                          | 1.83  | 10.61 | 8.25  | ✓             | 22.22             | 1.21           | 15.27      | ✓             | ☐            | ✓             | 0.25         | ✓             | 3                  | —                | Low Risk       |  |
| percentile rank                          |        |                           | 20                            | 60    | 36    | 6     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 392                           | 372   | 338   | 218   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Causeway International Value Instl       | CIVIX  | Foreign Large Value       | 11.20                         | 12.73 | 18.05 | 6.11  | ✓             | 18.37             | 1.05           | 23.44      | ✓             | ☐            | ✗             | 0.85         | ✓             | 4                  | —                | Low Risk       |  |
| percentile rank                          |        |                           | 39                            | 3     | 8     | 19    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                   |        |                           | 369                           | 347   | 323   | 230   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |

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⊖ 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/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |
|                               |        |              |                               |      |       |       |               |                   |                |            |               |              |               |              |               | <i>Updated</i>     | <i>Updated</i>   | <i>Updated</i> |
| DFA Global Equity I           | DGEIX  | Global Stock | 5.15                          | 6.89 | 17.09 | 9.10  | ✓             | 17.00             | 1.03           | 13.10      | ✓             | —            | ✓             | 0.26         | ✓             | 1                  | —                | Medium Risk    |
| <i>percentile rank</i>        |        |              | 52                            | 42   | 6     | 21    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i> |        |              | 324                           | 307  | 288   | 192   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |

### Alternative

|                                      |       |                             |       |       |       |      |   |       |      |       |   |   |   |      |   |            |   |            |
|--------------------------------------|-------|-----------------------------|-------|-------|-------|------|---|-------|------|-------|---|---|---|------|---|------------|---|------------|
| PIMCO Commodity Real Ret Strat Instl | PCRIX | Commodities<br>Broad Basket | 13.27 | -2.04 | 17.04 | 3.44 | ✓ | 14.97 | 1.16 | 6.42  | ✓ | — | — | 1.00 | ✓ | 2          | — | —          |
| <i>percentile rank</i>               |       |                             | 9     | 87    | 35    | 51   |   |       |      |       |   |   |   |      |   |            |   |            |
| <i># of funds in category</i>        |       |                             | 110   | 101   | 95    | 67   |   |       |      |       |   |   |   |      |   | 02-28-2025 | — | —          |
| DFA Real Estate Securities I         | DFREX | Real Estate                 | 9.41  | -1.67 | 9.55  | 5.47 | ✓ | 20.40 | 0.99 | 13.10 | ✓ | — | ✓ | 0.18 | ✓ | 3          | — | Low Risk   |
| <i>percentile rank</i>               |       |                             | 35    | 42    | 52    | 27   |   |       |      |       |   |   |   |      |   |            |   |            |
| <i># of funds in category</i>        |       |                             | 229   | 221   | 204   | 152  |   |       |      |       |   |   |   |      |   | 02-28-2025 | — | 12-31-2022 |

### Fixed Income

|                                      |       |                              |      |       |       |      |   |       |      |       |   |   |   |      |   |            |            |   |
|--------------------------------------|-------|------------------------------|------|-------|-------|------|---|-------|------|-------|---|---|---|------|---|------------|------------|---|
| American Funds Capital World Bond R6 | RCWGX | Global Bond                  | 2.46 | -1.31 | -0.94 | 0.61 | ✓ | 10.23 | 0.93 | 6.09  | ✓ | — | — | 0.48 | ✓ | 2          | 1-Low      | — |
| <i>percentile rank</i>               |       |                              | 66   | 60    | 73    | 48   |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 162  | 160   | 153   | 127  |   |       |      |       |   |   |   |      |   | 02-28-2025 | 02-15-2022 | — |
| PGIM High Yield R6                   | PHYQX | High Yield Bond              | 8.35 | 4.69  | 7.48  | 5.27 | ✓ | 8.10  | 0.96 | 17.47 | ✓ | — | — | 0.38 | ✓ | 1          | —          | — |
| <i>percentile rank</i>               |       |                              | 6    | 37    | 28    | 8    |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 632  | 600   | 551   | 434  |   |       |      |       |   |   |   |      |   | 12-31-2024 | —          | — |
| BlackRock Inflation Protected Bond K | BPLBX | Inflation-<br>Protected Bond | 5.88 | 0.05  | 2.75  | 2.44 | ✓ | 7.39  | 1.02 | 7.05  | ✓ | — | — | 0.79 | ✓ | 3          | —          | — |
| <i>percentile rank</i>               |       |                              | 64   | 36    | 27    | 28   |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 158  | 150   | 141   | 117  |   |       |      |       |   |   |   |      |   | 11-30-2024 | —          | — |
| Baird Aggregate Bond Inst            | BAGIX | Intermediate-<br>Term Bond   | 5.22 | 1.03  | 0.37  | 1.86 | ✓ | 7.75  | 1.01 | 24.52 | ✓ | ⚠ | — | 0.30 | ✓ | 4          | 1-Low      | — |
| <i>percentile rank</i>               |       |                              | 28   | 21    | 27    | 16   |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 529  | 470   | 423   | 294  |   |       |      |       |   |   |   |      |   | 02-28-2025 | 02-15-2022 | — |
| PIMCO Income Instl                   | PIMIX | Multisector<br>Bond          | 7.41 | 4.63  | 5.23  | 4.41 | ✓ | 6.54  | 0.83 | 18.02 | ✓ | — | — | 0.83 | ✓ | 4          | —          | — |
| <i>percentile rank</i>               |       |                              | 29   | 17    | 40    | 3    |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 375  | 346   | 295   | 204  |   |       |      |       |   |   |   |      |   | 02-28-2025 | —          | — |
| Lincoln Stable Value Account -LNGPA  |       | Stable Value                 | —    | —     | —     | —    | — | —     | —    | 41.94 | ✓ | — | — | —    | — | —          | —          | — |
| <i>percentile rank</i>               |       |                              | —    | —     | —     | —    |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 10   | —     | —     | —    |   |       |      |       |   |   |   |      |   | —          | —          | — |
| Baird Ultra Short Bond Institutional | BUBIX | Ultrashort Bond              | 5.50 | 4.66  | 3.16  | 2.32 | ✓ | 0.65  | 0.04 | 11.25 | ✓ | — | — | 0.15 | ✓ | 3          | 1-Low      | — |
| <i>percentile rank</i>               |       |                              | 47   | 32    | 44    | 36   |   |       |      |       |   |   |   |      |   |            |            |   |
| <i># of funds in category</i>        |       |                              | 255  | 201   | 183   | 113  |   |       |      |       |   |   |   |      |   | 02-28-2025 | 02-15-2022 | — |

### Target Date

|                                  |       |             |      |      |       |      |   |       |      |      |   |   |   |      |   |            |            |            |
|----------------------------------|-------|-------------|------|------|-------|------|---|-------|------|------|---|---|---|------|---|------------|------------|------------|
| BlackRock LifePath® Index 2030 K | LINKX | Target Date | 6.31 | 3.76 | 9.20  | 6.31 | ✓ | 12.77 | 0.95 | 4.83 | ✓ | — | ✓ | 0.09 | ✓ | 4          | 1-Low      | Low Risk   |
| <i>percentile rank</i>           |       |             | 13   | 65   | 75    | 59   |   |       |      |      |   |   |   |      |   |            |            |            |
| <i># of funds in category</i>    |       |             | 237  | 220  | 187   | 124  |   |       |      |      |   |   |   |      |   | 02-28-2025 | 04-07-2022 | 12-31-2022 |
| BlackRock LifePath® Index 2035 K | LIJXK | Target Date | 6.38 | 4.47 | 10.96 | 7.10 | ✓ | 13.96 | 0.97 | 4.83 | ✓ | — | ✓ | 0.09 | ✓ | 4          | 1-Low      | Low Risk   |
| <i>percentile rank</i>           |       |             | 13   | 59   | 68    | 46   |   |       |      |      |   |   |   |      |   |            |            |            |
| <i># of funds in category</i>    |       |             | 234  | 211  | 180   | 123  |   |       |      |      |   |   |   |      |   | 02-28-2025 | 04-07-2022 | 12-31-2022 |

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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/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |
|                                                                                 |        |             |                               |                   |                    |                   |               |                   |                |            |               |              |               |              |               | Updated            | Updated          | Updated        |
| BlackRock LifePath® Index 2040 K<br>percentile rank<br># of funds in category   | LIKX   | Target Date | 6.59<br>11<br>233             | 5.18<br>55<br>215 | 12.61<br>43<br>182 | 7.82<br>33<br>124 | 🟢             | 15.07             | 0.99           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 4                  | 1-Low            | Low Risk       |
| BlackRock LifePath® Index 2045 K<br>percentile rank<br># of funds in category   | LIHX   | Target Date | 6.70<br>11<br>228             | 5.84<br>41<br>211 | 13.98<br>20<br>180 | 8.40<br>20<br>123 | 🟢             | 16.02             | 1.02           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 3                  | 1-Low            | Low Risk       |
| BlackRock LifePath® Index 2050 K<br>percentile rank<br># of funds in category   | LIPX   | Target Date | 6.82<br>10<br>231             | 6.29<br>21<br>213 | 14.74<br>7<br>182  | 8.70<br>7<br>124  | 🟢             | 16.52             | 1.03           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 3                  | 1-Low            | Low Risk       |
| BlackRock LifePath® Index 2055 K<br>percentile rank<br># of funds in category   | LIVX   | Target Date | 6.87<br>9<br>228              | 6.50<br>17<br>211 | 14.90<br>7<br>180  | 8.80<br>6<br>118  | 🟢             | 16.63             | 1.03           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 3                  | 1-Low            | Low Risk       |
| BlackRock LifePath® Index 2060 K<br>percentile rank<br># of funds in category   | LIZX   | Target Date | 6.87<br>10<br>224             | 6.50<br>18<br>207 | 14.90<br>7<br>171  | —<br>—<br>63      | 🟢             | 16.66             | 1.31           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 3                  | 1-Low            | Low Risk       |
| BlackRock LifePath® Index 2065 K<br>percentile rank<br># of funds in category   | LIWKX  | Target Date | 6.92<br>8<br>234              | 6.50<br>21<br>176 | 14.72<br>11<br>82  | —<br>—<br>—       | 🟢             | 16.69             | 1.31           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 3                  | 1-Low            | Low Risk       |
| BlackRock LifePath® Index Retire K<br>percentile rank<br># of funds in category | LIRX   | Target Date | 6.06<br>15<br>172             | 2.85<br>51<br>157 | 5.95<br>26<br>134  | 4.68<br>8<br>93   | 🟢             | 10.76             | 1.17           | 4.83       | 🟢             | —            | 🟢             | 0.09         | 🟢             | 5                  | 1-Low            | —              |

### Balanced

|                                     |       |                     |      |      |       |      |  |       |      |       |  |   |  |      |  |            |            |            |
|-------------------------------------|-------|---------------------|------|------|-------|------|--|-------|------|-------|--|---|--|------|--|------------|------------|------------|
| American Funds American Balanced R6 | RLBGX | Moderate Allocation | 8.35 | 6.52 | 11.14 | 8.36 |  | 11.97 | 0.97 | 26.26 |  | — |  | 0.25 |  | 3          | 1-Low      | Low Risk   |
| percentile rank                     |       |                     | 10   | 7    | 24    | 8    |  |       |      |       |  |   |  |      |  |            |            |            |
| # of funds in category              |       |                     | 715  | 690  | 638   | 496  |  |       |      |       |  |   |  |      |  | 02-28-2025 | 02-15-2022 | 12-31-2022 |