

# THE H J POIST GAS COMPANY 401K

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

- 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	Commit. Level	Carbon Risk
																Updated	Updated	Updated
<strong>US Stock</strong>																		
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	8.21	9.02	18.55	12.46	Pass	17.31	1.00	7.34	Pass	Pass	Pass	0.04	Pass	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
<strong>Non-US Stock</strong>																		
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	5.25	6.28	11.90	5.30	Pass	16.15	0.97	16.51	Pass	Pass	Pass	0.54	Pass	3	1-Low	Low Risk
percentile rank			66	34	44	50												
# 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	Pass	17.95	1.09	12.11	Pass	Pass	Pass	0.05	Pass	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
<strong>Alternative</strong>																		
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	9.00	-1.86	9.41	4.85	Pass	21.07	1.02	28.90	Pass	—	Pass	0.13	Pass	2	1-Low	Low Risk
percentile rank			47	52	61	50												
# of funds in category			229	221	204	152										02-28-2025	02-15-2022	12-31-2022
<strong>Fixed Income</strong>																		
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	5.22	1.03	0.37	1.86	Pass	7.75	1.01	24.52	Pass	Pass	—	0.30	Pass	4	1-Low	—
percentile rank			28	21	27	16												
# of funds in category			529	470	423	294										02-28-2025	02-15-2022	—