

THE INSTITUTE OF WORLD POLITICS 403

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
US Stock																			
Columbia Contrarian Core Inst3 percentile rank # of funds in category	COFYX	Large Blend	6.50 49 1,457	9.35 19 1,331	18.77 19 1,218	12.24 16 912	🟢	17.36	0.99	20.01	🟢	🇺🇸	✖	0.62	🟢	3	1-Low	Low Risk	
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	8.21 20 1,457	9.02 24 1,331	18.55 24 1,218	12.46 8 912	🟢	17.31	1.00	7.34	🟢	🇺🇸	🟢	0.04	🟢	3	1-Low	Low Risk	
MFS Growth R6 percentile rank # of funds in category	MFEKX	Large Growth	3.32 68 1,103	8.75 41 1,052	15.81 70 972	13.76 25 759	🟢	20.03	0.96	23.01	🟢	🇺🇸	🟢	0.49	🟢	3	2-Basic	Low Risk	
Invesco Growth and Income R6 percentile rank # of funds in category	GIFFX	Large Value	5.08 69 1,175	6.98 51 1,109	19.08 14 1,049	9.26 42 824	🟢	18.02	1.04	22.10	🟢	🇺🇸	🟢	0.42	🟢	2	—	Medium Risk	
Vanguard Mid-Cap Growth Index Admiral percentile rank # of funds in category	VMGMX	Mid-Cap Growth	4.49 7 509	3.95 23 493	14.82 18 459	9.37 30 369	🟢	21.38	0.96	2.12	✖	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk	
Vanguard Mid-Cap Value Index Admiral percentile rank # of funds in category	VMVAX	Mid-Cap Value	5.37 19 424	4.81 45 397	17.24 52 373	8.21 35 285	🟢	19.09	0.94	2.12	✖	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk	
Vanguard Small Cap Growth Index Admiral percentile rank # of funds in category	VSGAX	Small Growth	-2.83 32 559	1.18 37 543	11.47 58 528	7.30 50 398	🟢	23.14	0.95	20.26	🟢	🇺🇸	🟢	0.07	🟢	4	1-Low	Medium Risk	
JPMorgan Small Cap Value R6 percentile rank # of funds in category	JSVUX	Small Value	-4.21 61 503	0.81 73 482	16.57 61 456	5.83 66 365	🟢	22.85	0.95	14.42	🟢	🇺🇸	🟢	0.74	🟢	3	—	Medium Risk	
Non-US Stock																			
DFA Emerging Markets I percentile rank # of funds in category	DFEMX	Diversified Emerging Mkts	7.09 36 787	2.40 38 724	10.61 27 646	4.38 30 439	🟢	17.02	0.96	15.10	🟢	🇺🇸	🟢	0.36	🟢	2	—	Medium Risk	
American Funds Intl Gr and Inc R6 percentile rank # of funds in category	RIGGX	Foreign Large Blend	5.25 66 761	6.28 34 706	11.90 44 662	5.30 50 445	🟢	16.15	0.97	16.51	🟢	🇺🇸	🟢	0.54	🟢	3	1-Low	Low Risk	
MFS International Equity R6 percentile rank # of funds in category	MIEIX	Foreign Large Growth	5.99 50 761	6.90 19 706	12.44 28 662	7.17 5 445	🟢	17.24	1.03	15.51	🟢	🇺🇸	🟢	0.69	🟢	4	2-Basic	Low Risk	
Vanguard International Value Inv percentile rank # of funds in category	VTRIX	Foreign Large Value	1.59 97 369	4.54 89 347	11.60 81 323	4.65 67 230	🟢	17.13	0.99	14.85	🟢	🇺🇸	✖	0.36	🟢	3	—	Medium Risk	
American Funds Capital World Gr&Inc R6 percentile rank # of funds in category	RWIGX	Global Stock	5.50 45 324	7.49 31 307	13.97 56 288	8.27 45 192	🟢	16.19	0.98	19.17	🟢	—	🟢	0.41	🟢	2	1-Low	Low Risk	

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			Trailing Performance and Risk							Management			Style		Expense		ESG Metrics		
Name	Ticker	Asset Class	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	
Alternative																			
Invesco Balanced-Risk Commodity Strat R6 <i>percentile rank</i> <i># of funds in category</i>	IBRFX	Commodities Broad Basket	5.77	0.79	15.18	3.48	🟢	10.67	0.75	14.34	🟢	—	—	1.15	🟢	—	—	—	
			70	24	56	50													
			110	101	95	67											—	—	—
🔴 Invesco Global Real Estate R6 <i>percentile rank</i> <i># of funds in category</i>	FGREX	Global Real Estate	0.97	-4.64	4.67	1.47	🟢	19.30	0.96	18.38	🟢	🏠	🟢	0.95	🟢	3	—	Low Risk	
			70	65	81	75													
			172	169	165	125											02-28-2025	—	12-31-2022
Fixed Income																			
Baird Core Plus Bond Inst <i>percentile rank</i> <i># of funds in category</i>	BCOIX	Core Plus Bond	5.39	1.44	1.07	2.23	🟢	7.58	0.98	24.52	🟢	—	—	0.30	🟢	4	1-Low	—	
			41	24	41	21													
			583	542	490	354											02-28-2025	02-15-2022	—
PIMCO International Bond (USD-Hdg) Instl <i>percentile rank</i> <i># of funds in category</i>	PFORX	Global Bond	4.69	2.80	2.17	2.69	🟢	4.95	0.54	10.52	🟢	—	—	0.75	🟢	3	—	—	
			42	12	13	7													
			109	104	99	60											02-28-2025	—	—
BlackRock High Yield K <i>percentile rank</i> <i># of funds in category</i>	BRHYX	High Yield Bond	7.29	5.18	7.68	5.04	🟢	8.37	1.00	15.26	🟢	—	—	0.48	🟢	—	2-Basic	—	
			29	19	23	11													
			632	600	551	434										—	02-15-2022	—	
Vanguard Inflation-Protected Secs Adm <i>percentile rank</i> <i># of funds in category</i>	VAIPX	Inflation- Protected Bond	6.24	-0.08	2.25	2.41	🟢	7.24	1.00	3.39	🟢	—	—	0.10	🟢	3	—	—	
			36	50	53	35													
			158	150	141	117											02-28-2025	—	—
🔴 Western Asset Core Bond IS <i>percentile rank</i> <i># of funds in category</i>	WACSX	Intermediate- Term Bond	4.45	-0.41	-0.42	1.53	🟢	9.33	1.21	18.27	🟢	🏠	—	0.42	🟢	3	—	—	
			88	95	71	36													
			529	470	423	294											02-28-2025	—	—
Lincoln Stable Value Account -LNGPA <i>percentile rank</i> <i># of funds in category</i>		Stable Value	—	—	—	—	—	—	—	41.94	🟢	—	—	—	—	—	—	—	
			—	—	—	—													
			10	—	—	—											—	—	—
PIMCO Short-Term Instl <i>percentile rank</i> <i># of funds in category</i>	PTSHX	Ultrashort Bond	5.65	4.84	3.65	2.61	🟢	0.99	-0.02	14.25	🟢	—	—	0.48	🟢	3	—	—	
			36	20	21	10													
			255	201	183	113											02-28-2025	—	—
Target Date																			
JPMorgan SmartRetirement® 2020 R6 <i>percentile rank</i> <i># of funds in category</i>	JTTYX	Target Date	5.74	3.77	6.57	4.73	🟢	9.58	0.81	16.76	🟢	—	🟢	0.34	🟢	3	—	—	
			39	19	82	86													
			151	135	119	70											02-28-2025	—	—
JPMorgan SmartRetirement® 2025 R6 <i>percentile rank</i> <i># of funds in category</i>	JNSYX	Target Date	5.69	3.94	8.06	5.41	🟢	10.88	0.86	16.76	🟢	—	🟢	0.35	🟢	3	—	—	
			43	29	66	71													
			202	185	158	102											02-28-2025	—	—
JPMorgan SmartRetirement® 2030 R6 <i>percentile rank</i> <i># of funds in category</i>	JSMYX	Target Date	5.65	4.57	9.62	6.12	🟢	12.27	0.91	16.76	🟢	—	🟢	0.35	🟢	3	—	Low Risk	
			47	20	61	70													
			237	220	187	124											02-28-2025	—	12-31-2022

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			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
JPMorgan SmartRetirement® 2035 R6 percentile rank # of funds in category	SRJYX	Target Date	5.79 37 234	5.28 14 211	11.79 23 180	6.98 53 123	✔ 	13.54 	0.94 	16.76 	✔ 	— 	✔ 	0.40 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® 2040 R6 percentile rank # of funds in category	SMTYX	Target Date	5.74 44 233	5.77 21 215	13.09 23 182	7.55 54 124	✔ 	14.51 	0.95 	16.76 	✔ 	— 	✔ 	0.40 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® 2045 R6 percentile rank # of funds in category	JSAYX	Target Date	5.63 52 228	6.08 25 211	14.11 16 180	7.91 49 123	✔ 	15.26 	0.96 	16.76 	✔ 	— 	✔ 	0.40 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® 2050 R6 percentile rank # of funds in category	JTSYX	Target Date	5.69 46 231	6.27 24 213	14.21 19 182	7.96 59 124	✔ 	15.50 	0.96 	16.76 	✔ 	— 	✔ 	0.41 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® 2055 R6 percentile rank # of funds in category	JFFYX	Target Date	5.66 50 228	6.26 26 211	14.20 25 180	7.98 57 118	✔ 	15.47 	0.96 	13.17 	✔ 	— 	✔ 	0.41 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® 2060 R6 percentile rank # of funds in category	JAKYX	Target Date	5.70 44 224	6.27 28 207	14.18 37 171	— — 63	✔ 	15.47 	1.21 	8.59 	✔ 	— 	✔ 	0.41 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® 2065 Class R6 percentile rank # of funds in category	JSMOX	Target Date	5.58 49 234	— — 176	— — 82	— — —	— 	— 	— 	2.41 	✖ 	— 	✔ 	0.42 	✔ 	3 	— 	Low Risk
JPMorgan SmartRetirement® Income R6 percentile rank # of funds in category	JSIYX	Target Date	5.73 32 172	3.81 9 157	6.37 10 134	4.35 23 93	✔ 	9.56 	1.03 	16.76 	✔ 	— 	✔ 	0.34 	✔ 	3 	— 	—
Balanced																		
Invesco Equity and Income R6 percentile rank # of funds in category	IEIFX	Moderate Allocation	4.95 55 715	5.03 30 690	13.43 5 638	7.53 19 496	✔ 	13.44 	1.02 	21.93 	✔ 	— 	✔ 	0.41 	✔ 	1 	— 	Medium Risk