

JOHNSON MEMORIAL HOSPITAL DEFINED

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																					
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			
Vanguard Growth Index Admiral	VIGAX	Large Growth	8.26	9.51	19.49	14.21	✓	21.77	1.06	30.27	✓	🇺🇸	✓	0.05	✓	3	1-Low	Low Risk			
percentile rank			17	28	18	17															
# of funds in category			1,103	1,052	972	759										02-28-2025	02-15-2022	12-31-2022			
Vanguard Value Index Adm	VVIAX	Large Value	8.45	8.03	17.04	10.34	✓	15.87	0.92	30.27	✓	🇺🇸	✓	0.05	✓	3	1-Low	Medium Risk			
percentile rank			28	32	42	14															
# of funds in category			1,175	1,109	1,049	824										02-28-2025	02-15-2022	12-31-2022			
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend	5.14	4.51	16.21	8.92	✓	19.54	0.97	2.12	✖	🇺🇸	✓	0.05	✓	4	1-Low	Medium Risk			
percentile rank			11	45	51	25															
# of funds in category			446	409	375	252										02-28-2025	02-15-2022	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			
Vanguard Small Cap Value Index Admiral	VSIAX	Small Value	-0.78	4.21	18.41	7.70	✓	22.00	0.90	8.93	✓	🇺🇸	✓	0.07	✓	4	1-Low	Medium Risk			
percentile rank			28	32	38	19															
# of funds in category			503	482	456	365										02-28-2025	02-15-2022	12-31-2022			
Non-US Stock																					
Vanguard Emerging Mkts Stock Idx Adm	VEMAX	Diversified Emerging Mkts	11.18	2.76	9.40	3.99	✓	16.08	0.90	16.60	✓	🇺🇸	✓	0.13	✓	2	1-Low	Medium Risk			
percentile rank			10	32	39	38															
# of funds in category			787	724	646	439										02-28-2025	02-15-2022	12-31-2022			
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	5.25	6.28	11.90	5.30	✓	16.15	0.97	16.51	✓	🇺🇸	✓	0.54	✓	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	✓	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			
Alternative																					
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	9.00	-1.86	9.41	4.85	✓	21.07	1.02	28.90	✓	—	✓	0.13	✓	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			
Fixed Income																					
Baird Core Plus Bond Inst	BCOIX	Core Plus Bond	5.39	1.44	1.07	2.23	✓	7.58	0.98	24.52	✓	—	—	0.30	✓	4	1-Low	—			
percentile rank			41	24	41	21															
# of funds in category			583	542	490	354										02-28-2025	02-15-2022	—			

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																Updated	Updated	Updated
Vanguard Inflation-Protected Secs Adm percentile rank # of funds in category	VAIPX	Inflation-Protected Bond	6.24 36 158	-0.08 50 150	2.25 53 141	2.41 35 117	🟢	7.24	1.00	3.39	🟢	—	—	0.10	🟢	3	—	—
Baird Aggregate Bond Inst percentile rank # of funds in category	BAGIX	Intermediate-Term Bond	5.22 28 529	1.03 21 470	0.37 27 423	1.86 16 294	🟢	7.75	1.01	24.52	🟢	🟡	—	0.30	🟢	4	1-Low	—
Lincoln Stable Value Account -J97D percentile rank # of funds in category		Stable Value	— — 10	— — —	— — —	— — —	—	—	—	41.94	🟢	—	—	—	—	—	—	—
Federated Hermes Govt Ultrashort R6 percentile rank # of funds in category	FGULX	Ultrashort Bond	5.45 52 255	4.30 68 201	2.75 72 183	— — 113	🟢	0.83	0.07	27.74	🟢	—	—	0.24	🟢	—	—	—

Target Date																		
Vanguard Target Retirement 2020 Fund <i>percentile rank</i> <i># of funds in category</i>	VTWNX	Target Date	5.97 20 151	3.50 42 135	7.40 59 119	5.47 37 70		10.09	0.86	12.11		—		0.08		4	1-Low	—
Vanguard Target Retirement 2025 Fund <i>percentile rank</i> <i># of funds in category</i>	VTTVX	Target Date	6.10 20 202	4.08 18 185	8.77 36 158	6.16 19 102		11.63	0.92	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2030 Fund <i>percentile rank</i> <i># of funds in category</i>	VTHRX	Target Date	6.03 22 237	4.51 26 220	9.94 40 187	6.70 32 124		12.69	0.94	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2035 Fund <i>percentile rank</i> <i># of funds in category</i>	VTTX	Target Date	6.26 18 234	5.01 29 211	11.15 56 180	7.26 34 123		13.46	0.93	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2040 Fund <i>percentile rank</i> <i># of funds in category</i>	VFORX	Target Date	6.42 19 233	5.47 40 215	12.36 59 182	7.80 37 124		14.23	0.94	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2045 Fund <i>percentile rank</i> <i># of funds in category</i>	VTIVX	Target Date	6.57 19 228	5.90 35 211	13.56 44 180	8.27 27 123		15.03	0.95	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2050 Fund <i>percentile rank</i> <i># of funds in category</i>	VFIFX	Target Date	6.65 15 231	6.22 28 213	13.84 40 182	8.40 24 124		15.46	0.96	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2055 Fund <i>percentile rank</i> <i># of funds in category</i>	VFFVX	Target Date	6.67 18 228	6.23 30 211	13.84 51 180	8.38 32 118		15.47	0.96	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2060 Fund <i>percentile rank</i> <i># of funds in category</i>	VTTSX	Target Date	6.65 17 224	6.23 31 207	13.83 59 171	8.38 48 63		15.46	1.21	12.11		—		0.08		3	1-Low	Low Risk
Vanguard Target Retirement 2065 Fund <i>percentile rank</i> <i># of funds in category</i>	VLVX	Target Date	6.67 15 234	6.24 37 176	13.84 64 82	— — —		15.44	1.21	7.72		—		0.08		3	1-Low	Low Risk

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																Updated	Updated	Updated
Vanguard Target Retirement 2070 Fund	VSVNX	Target Date	6.61	—	—	—	—	—	—	2.76		—		0.53		3	—	Low Risk
percentile rank			19	—	—	—												
# of funds in category			234	176	82	—										02-28-2025	—	12-31-2022
Vanguard Target Retirement Income Fund	VTINX	Target Date	5.82	3.11	5.14	4.15		8.69	0.94	12.11		—		0.08		4	1-Low	—
percentile rank			27	32	61	38												
# of funds in category			172	157	134	93										02-28-2025	02-15-2022	—

Balanced																		
American Funds Capital Income Bldr R6	RIRGX	Global Allocation	12.06	6.44	10.86	6.33		12.09	0.88	33.27				0.27		2	—	Medium Risk
percentile rank			4	12	25	10												
# of funds in category			354	341	325	253										02-28-2025	—	12-31-2022