

KYMERA INDEPENDENT PHYSICIANS 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	
US Stock																			
American Funds Invmt Co of Amer R6 percentile rank # of funds in category	RICGX	Large Blend	10.09 7 1,457	11.70 4 1,331	18.77 19 1,218	11.75 35 912	✔	16.21	0.92	33.10	✔	☐	✔	0.27	✔	2	—	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	
Vanguard Growth Index Admiral percentile rank # of funds in category	VIGAX	Large Growth	8.26 17 1,103	9.51 28 1,052	19.49 18 972	14.21 17 759	✔	21.77	1.06	30.27	✔	☐	✔	0.05	✔	3	1-Low	Low Risk	
American Funds Washington Mutual R6 percentile rank # of funds in category	RWMGX	Large Value	9.70 8 1,457	9.65 15 1,331	18.07 41 1,218	11.70 38 912	✔	14.37	0.80	27.77	✔	☐	✔	0.26	✔	2	1-Low	Low 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 Selected Value Inv percentile rank # of funds in category	VASVX	Mid-Cap Value	-2.25 81 424	7.04 18 397	21.54 14 373	8.54 24 285	✔	20.97	1.02	20.11	✔	☐	✔	0.42	✔	4	—	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	
Vanguard Small Cap Value Index Admiral percentile rank # of funds in category	VSIAX	Small Value	-0.78 28 503	4.21 32 482	18.41 38 456	7.70 19 365	✔	22.00	0.90	8.93	✔	☐	✔	0.07	✔	4	1-Low	Medium Risk	
Non-US Stock																			
Vanguard Emerging Mkts Stock Idx Adm percentile rank # of funds in category	VEMAX	Diversified Emerging Mkts	11.18 10 787	2.76 32 724	9.40 39 646	3.99 38 439	✔	16.08	0.90	16.60	✔	☐	✔	0.13	✔	2	1-Low	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	
Vanguard International Growth Adm percentile rank # of funds in category	VWILX	Foreign Large Growth	5.46 20 392	1.83 60 372	10.61 36 338	8.25 6 218	✔	22.22	1.21	15.27	✔	☐	✔	0.25	✔	3	—	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	
DFA Global Equity I percentile rank # of funds in category	DGEIX	Global Stock	5.15 52 324	6.89 42 307	17.09 6 288	9.10 21 192	✔	17.00	1.03	13.10	✔	—	✔	0.26	✔	1	—	Medium Risk	

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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																			
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	13.27	-2.04	17.04	3.44	🟢	14.97	1.16	6.42	🟢	—	—	1.00	🟢	2	—	—	
percentile rank			9	87	35	51													
# of funds in category			110	101	95	67										02-28-2025	—	—	
Neuberger Berman Real Estate R6	NRREX	Real Estate	10.60	-2.17	8.38	6.07	🟢	20.52	0.99	19.26	🟢	—	🟢	0.75	🟢	3	—	Low Risk	
percentile rank			21	60	83	11													
# of funds in category			229	221	204	152										02-28-2025	—	12-31-2022	
Fixed Income																			
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	4.69	2.80	2.17	2.69	🟢	4.95	0.54	10.52	🟢	—	—	0.75	🟢	3	—	—	
percentile rank			42	12	13	7													
# of funds in category			109	104	99	60										02-28-2025	—	—	
⚠ Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	7.22	4.68	6.10	4.55	🟢	8.16	0.97	2.59	🔴	—	—	0.12	🟢	2	—	—	
percentile rank			32	38	70	29													
# of funds in category			632	600	551	434										02-28-2025	—	—	
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation- Protected Bond	6.24	-0.08	2.25	2.41	🟢	7.24	1.00	3.39	🟢	—	—	0.10	🟢	3	—	—	
percentile rank			36	50	53	35													
# of funds in category			158	150	141	117										02-28-2025	—	—	
BNY Mellon Bond Market Index I	DBIRX	Intermediate- Term Bond	4.76	0.30	-0.65	1.26	🟢	7.64	1.00	15.14	🟢	📊	—	0.15	🟢	3	—	—	
percentile rank			69	72	88	68													
# of funds in category			529	470	423	294										02-28-2025	—	—	
Loomis Sayles Bond N	LSBNX	Multisector Bond	8.25	2.92	4.34	2.69	🟢	8.04	1.01	18.17	🟢	—	—	0.60	🟢	2	1-Low	—	
percentile rank			14	61	65	74													
# of funds in category			375	346	295	204										02-28-2025	02-15-2022	—	
Lincoln Stable Value Account -LNGPA		Stable Value	—	—	—	—	—	—	—	41.94	🟢	—	—	—	—	—	—	—	
percentile rank			—	—	—	—													
# of funds in category			10	—	—	—										—	—	—	
Vanguard Ultra-Short-Term Bond Admiral	VUSFX	Ultrashort Bond	5.82	4.36	2.94	2.26	🟢	1.02	0.10	5.37	🟢	—	—	0.09	🟢	3	—	—	
percentile rank			26	62	64	45													
# of funds in category			255	201	183	113										02-28-2025	—	—	
Balanced																			
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	Target Risk	5.53	3.19	5.90	4.69	🟢	10.32	1.03	3.10	🟢	—	🟢	0.12	🟢	3	1-Low	—	
percentile rank			41	40	72	30													
# of funds in category			447	435	399	293										02-28-2025	07-19-2023	—	
Vanguard LifeStrategy Growth Inv	VASGX	Target Risk	6.37	5.55	12.18	7.67	🟢	14.41	1.03	3.10	🟢	—	🟢	0.14	🟢	3	1-Low	Low Risk	
percentile rank			20	28	41	29													
# of funds in category			306	297	267	220										02-28-2025	07-19-2023	12-31-2022	
Vanguard LifeStrategy Income Inv	VASIX	Target Risk	5.11	1.95	2.78	3.10	🟢	8.45	1.03	3.10	🟢	—	🟢	0.11	🟢	4	1-Low	—	
percentile rank			55	68	90	62													
# of funds in category			158	148	142	111										02-28-2025	07-19-2023	—	

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																		Updated	Updated	Updated	
Vanguard LifeStrategy Mod Gr Inv Shrs	VSMGX	Target Risk	5.93	4.37	9.01	6.20	🟢	12.34	1.01	3.10	🟢	—	🟢	0.13	🟢	3	1-Low	Low Risk			
percentile rank			33	45	74	52															
# of funds in category			715	690	638	496												02-28-2025	07-19-2023	12-31-2022	