

MURRAY EQUIPMENT INC 401K SALARY

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																		
JPMorgan US Equity R6	JUEMX	Large Blend	5.43	8.32	19.02	12.68		17.08	0.98	10.62				0.44		3	2-Basic	Low Risk
percentile rank			62	46	13	5												
# of funds in category			1,457	1,331	1,218	912										02-28-2025	03-11-2022	12-31-2022
Fidelity 500 Index	FXAIX	Large Blend Index	8.24	9.05	18.58	12.49		17.31	1.00	16.17				0.02		3	1-Low	Low Risk
percentile rank			19	22	23	7												
# of funds in category			1,457	1,331	1,218	912										02-28-2025	07-19-2023	12-31-2022
State St Russell Lg Cap Gr® Indx NL Cl C		Large Growth	7.74	10.06	20.03	15.07		20.48	1.00	25.76				0.04		3	—	Low Risk
percentile rank			22	18	12	8												
# of funds in category			1,103	1,052	972	759										02-28-2025	—	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 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
Vanguard Selected Value Inv	VASVX	Mid-Cap Value	-2.25	7.04	21.54	8.54		20.97	1.02	20.11				0.42		4	—	Medium Risk
percentile rank			81	18	14	24												
# 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	DFSVX	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
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
MFS International Equity R6	MIEIX	Foreign Large Growth	5.99	6.90	12.44	7.17		17.24	1.03	15.51				0.69		4	2-Basic	Low Risk
percentile rank			50	19	28	5												
# of funds in category			761	706	662	445										02-28-2025	02-15-2022	12-31-2022
Schwab Fundamental Intl Equity Index Fd	SFNNX	Foreign Large Value	5.61	7.52	15.13	6.17		17.25	1.00	7.93				0.25		1	—	Medium Risk
percentile rank			83	54	26	18												
# of funds in category			369	347	323	230										02-28-2025	—	12-31-2022

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																Updated	Updated	Updated	
Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	6.90	6.86	15.37	—	🟢	16.60	1.02	12.11	🟢	—	🟢	0.09	🟢	2	1-Low	Low Risk	
percentile rank			28	43	30	—													
# of funds in category			324	307	288	192										02-28-2025	02-15-2022	12-31-2022	

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	—	—
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
percentile rank			35	42	52	27												
# 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	—	—
DFA Inflation-Protected Securities I	DIPSX	Inflation-Protected Bond	6.49	0.07	2.41	2.54	✔	7.81	1.08	18.55	✔	—	—	0.11	✔	3	—	—
percentile rank			20	33	38	15												
# of funds in category			158	150	141	117										02-28-2025	—	—
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	5.22	1.03	0.37	1.86	✔	7.75	1.01	24.52	✔	📊	—	0.30	✔	4	1-Low	—
percentile rank			28	21	27	16												
# of funds in category			529	470	423	294										02-28-2025	02-15-2022	—
PIMCO Income Instl	PIMIX	Multisector Bond	7.41	4.63	5.23	4.41	✔	6.54	0.83	18.02	✔	—	—	0.83	✔	4	—	—
percentile rank			29	17	40	3												
# of funds in category			375	346	295	204										02-28-2025	—	—
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	—
percentile rank			47	32	44	36												
# of funds in category			255	201	183	113										02-28-2025	02-15-2022	—

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