

PARKCREST PLASTIC SURGERY INC

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

🚫 Fund Removed from Approved List ⚠️ Fund on Watch List

			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 <i>Updated</i>	Commit. Level <i>Updated</i>	Carbon Risk <i>Updated</i>	
US Stock																			
American Funds Invmt Co of Amer R6 <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	— —	Low Risk 12-31-2022	
Vanguard 500 Index Admiral <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
Vanguard Growth Index Admiral <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
MFS Value R4 <i>percentile rank</i> <i># of funds in category</i>	MELJX	Large Value	6.88 49 1,175	7.10 49 1,109	15.14 74 1,049	9.15 44 824	✔	15.53	0.90	18.85	✔	☒	✔	0.54	✔	3 02-28-2025	2-Basic 02-15-2022	Low Risk 12-31-2022	
Vanguard Mid-Cap Growth Index Admiral <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Medium Risk 12-31-2022	
Vanguard Mid-Cap Value Index Admiral <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Medium Risk 12-31-2022	
Vanguard Small Cap Growth Index Admiral <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Medium Risk 12-31-2022	
Vanguard Small Cap Value Index Admiral <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Medium Risk 12-31-2022	
Non-US Stock																			
American Funds New World R6 <i>percentile rank</i> <i># of funds in category</i>	RNWXG	Diversified Emerging Mkts	3.31 68 787	3.31 25 724	10.83 24 646	6.44 3 439	✔	15.36	0.78	25.81	✔	☒	✔	0.57	✔	3 02-28-2025	1-Low 02-15-2022	Medium Risk 12-31-2022	
American Funds Intl Gr and Inc R6 <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
MFS International Growth R4 <i>percentile rank</i> <i># of funds in category</i>	MGRVX	Foreign Large Growth	8.53 9 392	6.48 9 372	11.55 19 338	7.77 13 218	✔	16.96	0.96	13.25	✔	☒	✔	0.84	✔	5 02-28-2025	— —	Low Risk 12-31-2022	
Vanguard International Value Inv <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	— —	Medium Risk 12-31-2022	
American Funds Capital World Gr&Inc R6 <i>percentile rank</i> <i># of funds in category</i>	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 02-28-2025	1-Low 05-18-2022	Low Risk 12-31-2022	

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																	Updated	Updated	Updated
Alternative																			
PIMCO Commodity Real Return Strat I2 percentile rank # of funds in category	PCRPX	Commodities Broad Basket	13.15 9 110	-2.16 87 101	16.88 39 95	3.34 54 67	🟢	14.90	1.15	6.42	🟢	—	—	1.10	🟢	2	—	—	
Vanguard Real Estate Index Admiral percentile rank # of funds in category	VGSIX	Real Estate	9.00 47 229	-1.86 52 221	9.41 61 204	4.85 50 152	🟢	21.07	1.02	28.90	🟢	—	🟢	0.13	🟢	2	1-Low	Low Risk	
Fixed Income																			
Baird Core Plus Bond Inst percentile rank # of funds in category	BCOIX	Core Plus Bond	5.39 41 583	1.44 24 542	1.07 41 490	2.23 21 354	🟢	7.58	0.98	24.52	🟢	—	—	0.30	🟢	4	1-Low	—	
PIMCO International Bond (USD-Hdg) I-2 percentile rank # of funds in category	PFBPX	Global Bond	4.59 43 109	2.70 12 104	2.07 14 99	2.59 10 60	🟢	4.95	0.54	10.52	🟢	—	—	0.85	🟢	3	—	—	
BlackRock High Yield Instl percentile rank # of funds in category	BHYIX	High Yield Bond	7.34 27 632	5.08 22 600	7.60 24 551	4.95 13 434	🟢	8.34	0.99	15.26	🟢	—	—	0.58	🟢	—	2-Basic	—	
BlackRock Inflation Protected Bond Instl percentile rank # of funds in category	BPRIX	Inflation- Protected Bond	5.81 66 158	-0.01 47 150	2.70 30 141	2.38 38 117	🟢	7.43	1.02	7.05	🟢	—	—	0.84	🔴	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	—	
PIMCO Short-Term I2 percentile rank # of funds in category	PTSPX	Ultrashort Bond	5.55 43 255	4.73 26 201	3.55 25 183	2.50 22 113	🟢	0.99	-0.02	14.25	🟢	—	—	0.58	🔴	3	—	—	
Target Date																			
Vanguard Target Retirement 2020 Fund percentile rank # of funds in category	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 percentile rank # of funds in category	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 percentile rank # of funds in category	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 percentile rank # of funds in category	VTTTHX	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	

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																Updated	Updated	Updated
Vanguard Target Retirement 2040 Fund percentile rank # of funds in category	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 percentile rank # of funds in category	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 percentile rank # of funds in category	VFIX	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 percentile rank # of funds in category	VFBVX	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 percentile rank # of funds in category	VFTSX	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 percentile rank # of funds in category	VLXVX	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
Vanguard Target Retirement 2070 Fund percentile rank # of funds in category	VSVNX	Target Date	6.61 19 234	— — 176	— — 82	— — —	—	—	—	2.76	🔴	—	🟢	0.53	🟢	3	—	Low Risk
Vanguard Target Retirement Income Fund percentile rank # of funds in category	VTINX	Target Date	5.82 27 172	3.11 32 157	5.14 61 134	4.15 38 93	🟢	8.69	0.94	12.11	🟢	—	🟢	0.08	🟢	4	1-Low	—
Balanced																		
American Funds American Balanced R6 percentile rank # of funds in category	RLBGX	Moderate Allocation	8.35 10 715	6.52 7 690	11.14 24 638	8.36 8 496	🟢	11.97	0.97	26.26	🟢	—	🟢	0.25	🟢	3	1-Low	Low Risk