

SOUTHERN ORTHOPAEDIC SPECIALISTS

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 Windsor™ II Admiral™	VWNAX	Large Value	4.27	7.46	18.57	10.37	✓	16.77	0.95	21.32	✓	🇺🇸	✖	0.23	✓	3	—	Low Risk	
percentile rank			76	42	19	14													
# of funds in category			1,175	1,109	1,049	824										02-28-2025	—	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																			
American Funds New World R6	RNWXG	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
MFS Research International R6	MRSKX	Foreign Large Blend	3.37	3.97	9.95	5.38	✓	16.80	1.01	2.25	✖	🇺🇸	✓	0.63	✓	3	2-Basic	Low Risk	
percentile rank			85	83	81	47													
# 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																			
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	—	—

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																Updated	Updated	Updated
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	—
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	—
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