

STANCO METAL PRODUCTS INC EMPLOYEES

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	Commit. Level	Carbon Risk	
																Updated	Updated	Updated	
US Stock																			
T. Rowe Price Dividend Growth	PRDGX	Large Blend	7.38	7.58	15.89	11.44	✓	14.88	0.81	25.02	✓	🏠	✓	0.64	✓	3	—	Low Risk	
percentile rank			35	62	78	45													
# of funds in category			1,457	1,331	1,218	912										02-28-2025	—	12-31-2022	
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	
Fidelity Contrafund	FCNTX	Large Growth	10.57	13.09	20.01	14.36	✓	18.60	0.87	34.56	✓	🏠	✓	0.63	✓	1	1-Low	Low Risk	
percentile rank			7	1	12	15													
# of funds in category			1,103	1,052	972	759										02-28-2025	02-15-2022	12-31-2022	
American Funds Washington Mutual R6	RWMGX	Large Value	9.70	9.65	18.07	11.70	✓	14.37	0.80	27.77	✓	🏠	✓	0.26	✓	2	1-Low	Low Risk	
percentile rank			8	15	41	38													
# of funds in category			1,457	1,331	1,218	912										02-28-2025	02-15-2022	12-31-2022	
Neuberger Berman Mid Cap Growth Inst	NBMLX	Mid-Cap Growth	-1.30	3.15	13.09	9.00	✓	21.94	0.97	5.21	✓	🏠	✓	0.69	✓	3	—	Medium Risk	
percentile rank			35	33	34	39													
# of funds in category			509	493	459	369										02-28-2025	—	12-31-2022	
American Century Mid Cap Value I	AVUAX	Mid-Cap Value	5.99	4.41	15.11	8.22	✓	16.74	0.81	21.01	✓	🏠	✓	0.78	✓	3	1-Low	Medium Risk	
percentile rank			18	56	82	35													
# of funds in category			424	397	373	285										02-28-2025	02-15-2022	12-31-2022	
MFS New Discovery R4	MNDJX	Small Growth	-7.68	-1.95	8.44	7.56	✓	20.86	0.85	11.25	✓	🏠	✓	1.03	✓	4	—	Medium Risk	
percentile rank			74	72	86	47													
# of funds in category			559	543	528	398										02-28-2025	—	12-31-2022	
Macquarie Small Cap Value Instl	DEVIX	Small Value	-0.80	1.52	16.12	6.65	✓	22.89	0.94	12.76	✓	🏠	✓	0.85	✓	3	—	Medium Risk	
percentile rank			28	66	66	43													
# of funds in category			503	482	456	365										02-28-2025	—	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	
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	
Invesco Oppenheimer International Gr Y	OIGYX	Foreign Large Growth	-5.17	1.79	8.16	4.29	✓	20.54	1.17	13.01	✓	🏠	✓	0.86	✓	4	—	Low Risk	
percentile rank			87	61	69	80													
# of funds in category			392	372	338	218										02-28-2025	—	12-31-2022	
Vanguard International Value Inv	VTRIX	Foreign Large Value	1.59	4.54	11.60	4.65	✓	17.13	0.99	14.85	✓	🏠	✖	0.36	✓	3	—	Medium Risk	
percentile rank			97	89	81	67													
# of funds in category			369	347	323	230										02-28-2025	—	12-31-2022	
American Funds New Perspective R6	RNPGX	Global Stock	5.96	5.89	15.61	10.74	✓	17.66	1.07	24.35	✓	—	✓	0.41	✓	3	2-Basic	Low Risk	
percentile rank			22	36	16	14													
# of funds in category			342	328	280	196										02-28-2025	02-15-2022	12-31-2022	

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			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
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 02-28-2025	— —	— —	
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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
Fixed Income																			
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 02-28-2025	— —	— —	
Eaton Vance Income Fund of Boston I percentile rank # of funds in category	EIBIX	High Yield Bond	6.38 66 632	4.73 35 600	7.14 38 551	4.66 23 434	🟢	7.74	0.92	10.41	🟢	—	—	0.73	🟢	— —	— —	— —	
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 11-30-2024	— —	— —	
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 02-28-2025	1-Low 02-15-2022	— —	
PIMCO Income I2 percentile rank # of funds in category	PONPX	Multisector Bond	7.30 31 375	4.53 18 346	5.12 42 295	4.30 6 204	🟢	6.54	0.83	18.02	🟢	—	—	0.93	🟢	4 02-28-2025	— —	— —	
Federated Hermes Govt Ultrashort IS percentile rank # of funds in category	FGUSX	Ultrashort Bond	5.43 53 255	4.28 71 201	2.73 73 183	1.91 73 113	🔴	0.84	0.07	27.74	🟢	—	—	0.26	🟢	— —	— —	— —	
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 02-28-2025	1-Low 02-15-2022	— —	
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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	
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 02-28-2025	1-Low 02-15-2022	Low Risk 12-31-2022	

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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	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 percentile rank # of funds in category	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 percentile rank # of funds in category	VITSX	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																		
BlackRock Global Allocation Instl percentile rank # of funds in category	MALOX	Global Allocation	3.67 74 354	3.53 48 341	8.83 54 325	5.21 32 253	🟢	12.10	0.93	8.25	🟢	📊	🔴	0.85	🟢	3	—	Low Risk