

WASHINGTON SURVEYING AND RATING

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	
US Stock																			
American Funds Invmt Co of Amer R6	RICGX	Large Blend	10.09	11.70	18.77	11.75	✔	16.21	0.92	33.10	✔	🗲	✔	0.27	✔	2	—	Low Risk	
percentile rank			7	4	19	35													
# 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	
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	
State St Russell Lg Cp Val® Indx NL Cl C		Large Value	7.12	6.59	16.12	8.80	✔	17.00	1.00	26.11	✔	🗲	✔	0.04	✔	3	—	Medium Risk	
percentile rank			44	59	60	55													
# of funds in category			1,175	1,109	1,049	824										02-28-2025	—	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 Mid-Cap Value Index Admiral	VMVAX	Mid-Cap Value	5.37	4.81	17.24	8.21	✔	19.09	0.94	2.12	✖	🗲	✔	0.07	✔	4	1-Low	Medium Risk	
percentile rank			19	45	52	35													
# of funds in category			424	397	373	285										02-28-2025	02-15-2022	12-31-2022	
State St Russell Sm Cap® Gr Indx NL Cl C		Small Growth	-4.83	0.74	10.64	6.02	✔	23.83	1.00	15.58	✔	🗲	✔	0.05	✔	2	—	Medium Risk	
percentile rank			50	47	70	81													
# of funds in category			559	543	528	398										02-28-2025	—	12-31-2022	
State St Russell Sm Cp® Val Indx NL Cl C		Small Value	-3.16	-0.02	15.19	6.06	✔	23.90	1.00	15.58	✔	🗲	✔	0.05	✔	2	—	Medium Risk	
percentile rank			48	85	81	61													
# of funds in category			503	482	456	365										02-28-2025	—	12-31-2022	
Non-US Stock																			
Vanguard Emerging Mkts Stock Idx Adm	VEMAX	Diversified Emerging Mkts	11.18	2.76	9.40	3.99	✔	16.08	0.90	16.60	✔	🗲	✔	0.13	✔	2	1-Low	Medium Risk	
percentile rank			10	32	39	38													
# 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 International Growth Adm	VWILX	Foreign Large Growth	5.46	1.83	10.61	8.25	✔	22.22	1.21	15.27	✔	🗲	✔	0.25	✔	3	—	Low Risk	
percentile rank			20	60	36	6													
# 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	
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	

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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	—	—	
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																			
Baird Core Plus Bond Inst	BCOIX	Core Plus Bond	5.39	1.44	1.07	2.23	🟢	7.58	0.98	24.52	🟢	—	—	0.30	🟢	4	1-Low	—	
percentile rank			41	24	41	21													
# of funds in category			583	542	490	354										02-28-2025	02-15-2022	—	
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	—	—	
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	—	
Lincoln Stable Value Account -L7NGPA		Stable Value	—	—	—	—	—	—	—	41.94	🟢	—	—	—	—	—	—	—	
percentile rank			—	—	—	—													
# of funds in category			10	—	—	—										—	—	—	
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	5.45	4.30	2.75	—	🟢	0.83	0.07	27.74	🟢	—	—	0.24	🟢	—	—	—	
percentile rank			52	68	72	—													
# of funds in category			255	201	183	113										—	—	—	
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		