

ASSOCIATION OF STATE FLOODPLAIN

Screens Summary (Data as of 03-31-2026)

⊖ 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 Updated	Commit. Level Updated	Carbon Risk Updated
US Stock																		
Vanguard 500 Index Admiral	VFIAX	Large Blend Index	17.75	18.27	12.02	14.12	✓	12.06	1.00	8.34	✓	☒	✓	0.04	✓	3	1-Low	Low Risk
percentile rank			34	25	19	15												
# of funds in category			1,457	1,349	1,250	987									02-28-2026	02-15-2022	12-31-2022	
MFS Growth R6	MFEKX	Large Growth	10.67	17.81	8.99	14.66	✓	15.14	0.97	24.01	✓	☒	✓	0.52	✓	4	2-Basic	Low Risk
percentile rank			78	65	55	46												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	02-15-2022	12-31-2022	
Invesco Diversified Dividend R6	LCEFX	Large Value	14.03	12.96	9.32	8.91	✓	11.79	0.91	10.10	✓	☒	✓	0.47	✓	4	-	Medium Risk
percentile rank			60	66	60	90												
# of funds in category			1,198	1,155	1,089	918									02-28-2026	-	12-31-2022	
Fidelity Mid Cap Index	FSMDX	Mid-Cap Blend	15.99	13.33	7.26	10.90	✓	15.30	1.00	14.57	✓	☒	✓	0.03	✓	3	-	Medium Risk
percentile rank			52	33	42	26												
# of funds in category			492	435	406	313									02-28-2026	-	12-31-2022	
MFS Mid Cap Growth R6	OTCKX	Mid-Cap Growth	3.42	8.03	2.60	10.86	✓	15.66	0.85	17.37	✓	☒	✓	0.65	✓	3	2-Basic	Low Risk
percentile rank			80	68	47	39												
# of funds in category			584	566	545	460									02-28-2026	02-15-2022	12-31-2022	
Vanguard Selected Value Inv	VASVX	Mid-Cap Value	13.88	12.92	8.94	10.40	✓	16.32	1.02	21.11	✓	☒	✓	0.34	✓	4	-	Medium Risk
percentile rank			55	43	38	30												
# of funds in category			482	455	432	354									02-28-2026	-	12-31-2022	
Fidelity Small Cap Index	FSSNX	Small Blend	25.87	13.18	3.87	10.01	✓	19.36	1.00	14.57	✓	☒	✓	0.03	✓	2	-	Medium Risk
percentile rank			17	22	74	36												
# of funds in category			699	663	639	514									02-28-2026	-	12-31-2022	
PGIM Jennison Small Company R6	PJSQX	Small Growth	18.05	10.18	5.48	10.99	✓	17.04	0.79	12.35	✓	☒	✖	0.69	✓	3	-	Medium Risk
percentile rank			49	47	14	36												
# of funds in category			643	626	602	489									02-28-2026	-	12-31-2022	
DFA US Small Cap Value I	DFS VX	Small Value	26.13	14.71	9.98	10.88	✓	19.17	0.97	14.10	✓	☒	✓	0.31	✓	3	-	Medium Risk
percentile rank			20	17	7	13												
# of funds in category			563	541	517	427									02-28-2026	-	12-31-2022	
Non-US Stock																		
American Funds New World R6	RNWGX	Diversified Emerging Mkts	24.59	13.85	5.13	9.73	✓	12.48	0.73	26.81	✓	☒	✓	0.57	✓	4	1-Low	Medium Risk
percentile rank			81	67	38	12												
# of funds in category			816	775	697	531									02-28-2026	02-15-2022	12-31-2022	
American Funds Intl Gr and Inc R6	RIGGX	Foreign Large Blend	28.19	15.39	8.07	9.06	✓	12.39	0.91	17.51	✓	☒	✓	0.53	✓	3	1-Low	Low Risk
percentile rank			17	29	38	27												
# of funds in category			839	800	749	589									02-28-2026	02-15-2022	12-31-2022	
Vanguard Developed Markets Index Admiral	VTMGX	Foreign Large Blend Index	29.60	15.96	8.80	9.20	✓	13.68	1.00	13.11	✓	☒	✓	0.05	✓	2	1-Low	Low Risk
percentile rank			12	22	22	22												
# of funds in category			839	800	749	589									02-28-2026	02-15-2022	12-31-2022	
American Funds Capital World Gr&Inc R6	RWIGX	Global Stock	23.63	17.21	9.39	11.06	✓	11.49	0.96	20.17	✓	-	✓	0.41	✓	2	1-Low	Low Risk
percentile rank			14	14	37	32												
# of funds in category			347	322	316	226									02-28-2026	05-18-2022	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	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated	
Alternative																		
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	30.78	13.56	13.44	8.70	✔	12.05	0.95	7.42	✔	—	—	0.90	✔	2	-	-
percentile rank			57	51	59	53												
# of funds in category			127	118	112	83									02-28-2026	-	-	
Vanguard Real Estate Index Admiral	VGSLX	Real Estate	1.84	6.41	3.17	4.64	✔	16.54	1.01	29.90	✔	—	✔	0.13	✔	2	1-Low	Low Risk
percentile rank			65	56	63	57												
# of funds in category			248	237	230	185									02-28-2026	02-15-2022	12-31-2022	
Fixed Income																		
Baird Aggregate Bond Inst	BAGIX	Intermediate-Term Bond	4.35	4.12	0.55	2.12	✔	5.73	1.01	25.52	✔	☒	—	0.30	✔	4	1-Low	-
percentile rank			41	24	22	18												
# of funds in category			551	515	468	345									02-28-2026	02-15-2022	-	
PIMCO Income Instl	PIMIX	Multisector Bond	6.91	7.46	3.81	4.85	✔	4.65	0.82	19.02	✔	—	—	0.54	✔	4	-	-
percentile rank			11	22	16	13												
# of funds in category			396	379	345	253									02-28-2026	-	-	
Lincoln Stable Value Account -LNGPA		Stable Value	-	-	-	-	—	-	-	42.94	✔	—	—	-	-	-	-	-
percentile rank			-	-	-	-												
# of funds in category			38	-	-	-												
Target Date																		
American Funds 2010 Trgt Date Ret Inc R6	RFTTX	Target Date	10.28	9.09	5.31	6.35	✔	6.35	0.96	14.25	✔	—	✖	0.28	✔	3	-	-
percentile rank			3	9	1	1												
# of funds in category			110	97	87	64									02-28-2026	-	-	
American Funds 2015 Trgt Date Ret Inc R6	RFJTX	Target Date	10.62	9.43	5.42	6.68	✔	6.56	0.91	14.25	✔	—	✖	0.30	✔	2	-	-
percentile rank			20	5	1	1												
# of funds in category			116	105	99	74									02-28-2026	-	-	
American Funds 2020 Trgt Date Ret Inc R6	RRCTX	Target Date	11.29	9.94	5.67	7.13	✔	7.01	0.88	14.25	✔	—	✔	0.30	✔	2	-	-
percentile rank			29	4	1	9												
# of funds in category			150	136	123	84									02-28-2026	-	-	
American Funds 2025 Trgt Date Ret Inc R6	RFDTX	Target Date	11.60	10.34	5.76	7.86	✔	7.30	0.85	14.25	✔	—	✔	0.31	✔	3	-	Low Risk
percentile rank			45	21	1	3												
# of funds in category			191	176	162	114									02-28-2026	-	06-30-2022	
American Funds 2030 Trgt Date Retire R6	RFETX	Target Date	13.12	11.54	6.40	8.90	✔	8.20	0.88	14.25	✔	—	✔	0.33	✔	3	-	Low Risk
percentile rank			41	16	1	1												
# of funds in category			275	258	243	168									02-28-2026	-	12-31-2022	
American Funds 2035 Trgt Date Retire R6	RFFTX	Target Date	14.63	12.98	7.20	10.10	✔	9.12	0.90	14.25	✔	—	✔	0.34	✔	3	-	Low Risk
percentile rank			50	13	5	1												
# of funds in category			270	254	234	168									02-28-2026	-	12-31-2022	
American Funds 2040 Trgt Date Retire R6	RF GTX	Target Date	17.42	14.73	8.14	10.91	✔	10.37	0.95	14.25	✔	—	✖	0.36	✔	3	-	Low Risk
percentile rank			27	11	10	1												
# of funds in category			270	251	236	168									02-28-2026	-	12-31-2022	

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American Funds 2045 Trgt Date Retire R6 percentile rank # of funds in category	RFHTX	Target Date	18.26 39 264	15.20 19 249	8.32 24 234	11.13 1 168	✔	10.87	0.94	14.25	✔	—	✘	0.37	✔	3	—	Low Risk
American Funds 2050 Trgt Date Retire R6 percentile rank # of funds in category	RFITX	Target Date	18.37 64 269	15.32 33 251	8.25 49 236	11.18 5 168	✔	11.07	0.93	14.25	✔	—	✘	0.37	✔	3	—	Low Risk
American Funds 2055 Trgt Date Retire R6 percentile rank # of funds in category	RFKTX	Target Date	18.89 61 263	15.50 36 248	8.23 52 233	11.16 7 168	✔	11.32	0.94	14.25	✔	—	✘	0.38	✔	3	—	Low Risk
American Funds 2060 Trgt Date Retire R6 percentile rank # of funds in category	RFUTX	Target Date	18.96 64 262	15.54 35 247	8.21 53 232	11.14 11 126	✔	11.42	1.18	11.02	✔	—	✘	0.39	✔	2	—	Low Risk
American Funds 2065 Trgt Date Retire R6 percentile rank # of funds in category	RFVTX	Target Date	18.97 69 378	15.52 44 248	8.21 59 184	- - -	✔	11.39	1.17	6.25	✔	—	✘	0.39	✔	2	—	Low Risk
American Funds 2070 Trgt Date Retire R6 percentile rank # of funds in category	RFBFX	Target Date	19.08 68 378	- - 248	- - 184	- - -	—	-	-	2.25	✘	—	✔	0.39	✔	2	—	-

Balanced																		
American Funds American Balanced R6 percentile rank # of funds in category	RLBGX	Moderate Allocation	17.76 8 541	14.65 5 517	8.86 4 499	9.82 8 419	✔	8.74	1.02	27.26	✔	—	✔	0.25	✔	3	1-Low	Low Risk