

BRENNAN CENTER FOR JUSTICE 401K

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																		
Nuveen Large Cap Responsible Eq R6 percentile rank # of funds in category	TISCX	Large Blend	16.35 54 1,457	15.54 66 1,349	9.62 68 1,250	13.10 50 987	✔️	13.06	1.05	20.26	✔️	🇺🇸	✔️	0.17	✔️	5	3- Advanced	Low Risk
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	17.75 34 1,457	18.27 25 1,349	12.02 19 1,250	14.12 15 987	✔️	12.06	1.00	8.34	✔️	🇺🇸	✔️	0.04	✔️	3	1-Low	Low Risk
MFS Growth R6 percentile rank # of funds in category	MFEKX	Large Growth	10.67 78 1,213	17.81 65 1,135	8.99 55 1,073	14.66 46 882	✔️	15.14	0.97	24.01	✔️	🇺🇸	✔️	0.52	✔️	4	2-Basic	Low Risk
Invesco Growth and Income R6 percentile rank # of funds in category	GIFFX	Large Value	16.91 33 1,198	15.54 27 1,155	10.45 34 1,089	11.49 29 918	✔️	13.12	1.00	23.10	✔️	🇺🇸	✔️	0.42	✔️	3	-	Medium Risk
State St S&P Mid Cap® Indx NL Cl C percentile rank # of funds in category		Mid-Cap Blend	17.24 40 492	12.02 52 435	6.86 55 406	10.52 39 313	✔️	16.23	1.04	29.53	✔️	🇺🇸	✖️	0.05	✔️	2	-	Medium Risk
State St Russell Sm Cap® Gr Indx NL Cl C percentile rank # of funds in category		Small Growth	23.63 26 643	12.27 30 626	1.55 50 602	9.67 60 489	✔️	20.05	1.00	16.58	✔️	🇺🇸	✔️	0.05	✔️	2	-	Medium Risk
State St Russell Sm Cp® Val Indx NL Cl C percentile rank # of funds in category		Small Value	28.06 15 563	13.73 24 541	5.74 62 517	9.60 35 427	✔️	19.37	1.00	16.58	✔️	🇺🇸	✔️	0.05	✔️	2	-	Medium Risk
Non-US Stock																		
American Funds New World R6 percentile rank # of funds in category	RNWGX	Diversified Emerging Mkts	24.59 81 816	13.85 67 775	5.13 38 697	9.73 12 531	✔️	12.48	0.73	26.81	✔️	🇺🇸	✔️	0.57	✔️	4	1-Low	Medium Risk
American Funds Intl Gr and Inc R6 percentile rank # of funds in category	RIGGX	Foreign Large Blend	28.19 17 839	15.39 29 800	8.07 38 749	9.06 27 589	✔️	12.39	0.91	17.51	✔️	🇺🇸	✔️	0.53	✔️	3	1-Low	Low Risk
Vanguard Developed Markets Index Admiral percentile rank # of funds in category	VTMGX	Foreign Large Blend Index	29.60 12 839	15.96 22 800	8.80 22 749	9.20 22 589	✔️	13.68	1.00	13.11	✔️	🇺🇸	✔️	0.05	✔️	2	1-Low	Low Risk
Alternative																		
Vanguard Real Estate Index Admiral percentile rank # of funds in category	VGSLX	Real Estate	1.84 65 248	6.41 56 237	3.17 63 230	4.64 57 185	✔️	16.54	1.01	29.90	✔️	-	✔️	0.13	✔️	2	1-Low	Low Risk

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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
Fixed Income																			
⚠ BlackRock Inflation Protected Bond K	BPLBX	Inflation-Protected Bond	3.07	2.99	1.43	2.74	✓	4.31	1.00	2.09	✘	—	—	1.04	✘	3	-	-	
percentile rank			31	52	35	16													
# of funds in category			181	174	166	140									10-31-2025	-	-		
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 NY Stable Value Account -LYGPA		Stable Value	-	-	-	-	—	-	-	29.52	✓	—	—	-	-	-	-		
percentile rank			-	-	-	-													
# of funds in category			38	-	-	-													
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	4.71	5.17	3.41	2.43	✓	0.62	0.10	28.74	✓	—	—	0.24	✓	-	-	-	
percentile rank			16	53	51	70													
# of funds in category			256	219	187	117													
Balanced																			
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	Target Risk	11.12	8.93	4.04	5.80	✓	7.07	0.94	4.10	✓	☒	✓	0.10	✓	3	1-Low	-	
percentile rank			35	29	43	28													
# of funds in category			250	239	231	193									02-28-2026	07-19-2023	-		
Vanguard LifeStrategy Growth Inv	VASGX	Target Risk	18.45	14.25	7.69	9.76	✓	10.08	0.94	4.10	✓	☒	✓	0.10	✓	3	1-Low	Low Risk	
percentile rank			24	17	26	15													
# of funds in category			201	196	191	161									02-28-2026	07-19-2023	12-31-2022		
Vanguard LifeStrategy Income Inv	VASIX	Target Risk	7.40	6.25	2.15	3.73	✓	5.80	0.91	4.10	✓	☒	✓	0.10	✓	3	1-Low	-	
percentile rank			58	70	84	64													
# of funds in category			93	90	85	74									02-28-2026	07-19-2023	-		
Vanguard LifeStrategy Mod Gr Inv Shrs	VSMGX	Target Risk	14.77	11.57	5.86	7.79	✓	8.53	0.93	4.10	✓	☒	✓	0.10	✓	3	1-Low	Low Risk	
percentile rank			47	38	44	21													
# of funds in category			455	449	434	357									02-28-2026	07-19-2023	12-31-2022		