

# CYPRESS HILLS CEMETERY SECTION

## 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	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated	
<b>US Stock</b>																		
DFA US Core Equity 1 I	DFEOX	Large Blend	18.96	17.18	11.06	13.42	✓	12.69	1.02	14.10	✓	☐	✓	0.15	✓	2	-	Medium Risk
percentile rank			23	48	42	41												
# of funds in category			1,457	1,349	1,250	987									02-28-2026	-	12-31-2022	
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	
JPMorgan Large Cap Growth R6	JLGMX	Large Growth	13.47	20.19	10.90	18.28	✓	15.64	1.01	21.67	✓	☐	✓	0.44	✓	2	2-Basic	Low Risk
percentile rank			68	39	32	6												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	04-07-2022	12-31-2022	
Vanguard Equity-Income Adm	VEIRX	Large Value	15.80	14.68	11.01	11.51	✓	11.40	0.88	5.09	✓	☐	✓	0.17	✓	2	-	Medium Risk
percentile rank			43	41	24	28												
# of funds in category			1,198	1,155	1,089	918									02-28-2026	-	12-31-2022	
Vanguard Mid-Cap Growth Index Admiral	VMGMX	Mid-Cap Growth	5.92	10.47	4.42	10.68	✓	16.88	0.92	2.66	✖	☐	✓	0.07	✓	4	1-Low	Medium Risk
percentile rank			70	48	32	43												
# of funds in category			584	566	545	460									02-28-2026	02-15-2022	12-31-2022	
Allspring Special Mid Cap Value R6	WFPRX	Mid-Cap Value	11.78	10.12	8.29	10.22	✓	14.00	0.89	17.20	✓	☐	✓	0.70	✓	4	-	Medium Risk
percentile rank			66	74	47	36												
# of funds in category			482	455	432	354									02-28-2026	-	12-31-2022	
Vanguard Small Cap Growth Index Admiral	VSGAX	Small Growth	20.69	12.43	2.56	10.50	✓	18.58	0.91	21.26	✓	☐	✓	0.07	✓	4	1-Low	Medium Risk
percentile rank			37	28	37	46												
# of funds in category			643	626	602	489									02-28-2026	02-15-2022	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	
<b>Non-US Stock</b>																		
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	
⚠ MFS Research International R6	MRSKX	Foreign Large Blend	18.23	10.75	5.69	8.34	✓	12.64	0.91	3.25	✓	☐	✓	0.64	✓	3	2-Basic	Low Risk
percentile rank			80	89	82	54												
# 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	
Vanguard International Growth Adm	VWILX	Foreign Large Growth	12.45	8.41	-0.10	10.40	✓	15.82	0.99	16.27	✓	☐	✓	0.26	✓	3	-	Low Risk
percentile rank			48	54	78	1												
# of funds in category			432	409	382	268									02-28-2026	-	12-31-2022	
Causeway International Value Instl	CIVIX	Foreign Large Value	20.61	15.40	10.78	9.43	✓	14.51	1.01	24.44	✓	☐	✖	0.85	✓	4	-	Low Risk
percentile rank			90	78	54	43												
# of funds in category			399	376	358	286									02-28-2026	-	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
DFA Global Equity I	DGEIX	Global Stock	21.94	16.42	10.01	11.74	✔	12.17	1.01	14.10	✔	—	✔	0.25	✔	1	—	Medium Risk
percentile rank			24	30	22	14												
# of funds in category			347	322	316	226									02-28-2026	—	12-31-2022	

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	—	—	
DFA Real Estate Securities I	DFREX	Real Estate	2.48	6.53	3.87	5.25	✔	16.30	1.00	14.10	✔	—	✔	0.18	✔	2	—	Low Risk
percentile rank			56	50	45	37												
# of funds in category			248	237	230	185									02-28-2026	—	12-31-2022	

Fixed Income																		
American Funds Capital World Bond R6	RCWGX	Global Bond	3.99	2.53	-1.71	0.81	✔	7.40	0.87	7.09	✔	—	—	0.48	✔	2	1-Low	—
percentile rank			64	70	69	52												
# of funds in category			172	172	166	150									02-28-2026	02-15-2022	—	
PGIM High Yield R6	PHYQX	High Yield Bond	7.28	8.79	4.25	6.22	✔	4.64	1.04	18.47	✔	—	—	0.38	✔	1	—	—
percentile rank			23	14	29	12												
# of funds in category			661	637	594	481									12-31-2024	—	—	
⚠ 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	—	—	—									—	—	—	
Baird Ultra Short Bond Institutional	BUBIX	Ultrashort Bond	4.45	5.29	3.60	2.72	✔	0.36	0.04	12.25	✔	—	—	0.15	✔	4	1-Low	—
percentile rank			38	45	28	37												
# of funds in category			256	219	187	117									02-28-2026	02-15-2022	—	

Target Date																		
BlackRock LifePath® Index 2030 K	LINKX	Target Date	12.89	10.60	5.35	7.75	✔	8.45	0.92	5.83	✔	—	✔	0.09	✔	4	1-Low	Low Risk
percentile rank			47	58	52	62												
# of funds in category			275	258	243	168									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2035 K	LUKX	Target Date	14.78	12.07	6.39	8.76	✔	9.37	0.94	5.83	✔	—	✔	0.09	✔	3	1-Low	Low Risk
percentile rank			43	53	47	54												
# of funds in category			270	254	234	168									02-28-2026	04-07-2022	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 Updated	Commit. Level Updated	Carbon Risk Updated
BlackRock LifePath® Index 2040 K	LIKX	Target Date	16.80	13.62	7.43	9.71	✓	10.22	0.95	5.83	✓	—	✓	0.09	✓	3	1-Low	Low Risk
percentile rank			42	45	41	40												
# of funds in category			270	251	236	168									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2045 K	LIHX	Target Date	18.63	15.00	8.34	10.50	✓	10.98	0.97	5.83	✓	—	✓	0.09	✓	3	1-Low	Low Risk
percentile rank			26	23	23	26												
# of funds in category			264	249	234	168									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2050 K	LIPX	Target Date	20.40	16.11	9.04	10.99	✓	11.49	0.98	5.83	✓	—	✓	0.09	✓	3	1-Low	Low Risk
percentile rank			12	12	8	10												
# of funds in category			269	251	236	168									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2055 K	LIVX	Target Date	21.42	16.66	9.36	11.16	✓	11.67	0.99	5.83	✓	—	✓	0.09	✓	3	1-Low	Low Risk
percentile rank			8	5	7	8												
# of funds in category			263	248	233	168									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2060 K	LIZX	Target Date	21.51	16.68	9.36	11.17	✓	11.71	1.24	5.83	✓	—	✓	0.09	✓	3	1-Low	Low Risk
percentile rank			7	6	7	10												
# of funds in category			262	247	232	126									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2065 K	LIWKX	Target Date	21.48	16.67	9.38	-	✓	11.69	1.24	5.83	✓	—	✓	0.09	✓	3	1-Low	Low Risk
percentile rank			10	5	8	-												
# of funds in category			378	248	184	-									02-28-2026	04-07-2022	12-31-2022	
BlackRock LifePath® Index 2070 K	LIYKX	Target Date	21.35	-	-	-	—	-	-	1.51	✖	—	✓	0.09	✓	3	-	-
percentile rank			12	-	-	-												
# of funds in category			378	248	184	-									02-28-2026	-	-	
BlackRock LifePath® Index Retire K	LIRKX	Target Date	11.01	8.77	3.97	5.79	✓	7.20	1.15	5.83	✓	—	✓	0.09	✓	4	1-Low	-
percentile rank			7	12	21	7												
# of funds in category			206	194	184	125									02-28-2026	04-07-2022	-	
<b>Balanced</b>																		
American Funds American Balanced R6	RLBGX	Moderate Allocation	17.76	14.65	8.86	9.82	✓	8.74	1.02	27.26	✓	—	✓	0.25	✓	3	1-Low	Low Risk
percentile rank			8	5	4	8												
# of funds in category			541	517	499	419									02-28-2026	02-15-2022	12-31-2022	