

DOCTORS PEDIATRIC P C 401K PLAN

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 | |
| 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 | |
| Vanguard Growth Index Admiral | VIGAX | Large Growth | 18.25 | 21.13 | 11.80 | 16.12 | ✔️ | 15.54 | 1.02 | 31.27 | ✔️ | 🇺🇸 | ✔️ | 0.05 | ✔️ | 3 | 1-Low | Low Risk |
| percentile rank | | | 38 | 32 | 24 | 20 | | | | | | | | | | | | |
| # of funds in category | | | 1,213 | 1,135 | 1,073 | 882 | | | | | | | | | 02-28-2026 | 02-15-2022 | 12-31-2022 | |
| Vanguard Value Index Adm | VVIAX | Large Value | 16.03 | 15.07 | 10.98 | 11.85 | ✔️ | 12.01 | 0.94 | 31.27 | ✔️ | 🇺🇸 | ✔️ | 0.05 | ✔️ | 3 | 1-Low | Medium Risk |
| percentile rank | | | 40 | 34 | 24 | 21 | | | | | | | | | | | | |
| # of funds in category | | | 1,198 | 1,155 | 1,089 | 918 | | | | | | | | | 02-28-2026 | 02-15-2022 | 12-31-2022 | |
| Vanguard Mid Cap Index Admiral | VIMAX | Mid-Cap Blend | 12.75 | 12.60 | 6.97 | 10.71 | ✔️ | 14.64 | 0.95 | 2.66 | ✖️ | 🇺🇸 | ✔️ | 0.05 | ✔️ | 4 | 1-Low | Medium Risk |
| percentile rank | | | 67 | 44 | 51 | 33 | | | | | | | | | | | | |
| # of funds in category | | | 492 | 435 | 406 | 313 | | | | | | | | | 02-28-2026 | 02-15-2022 | 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 | |
| Vanguard Small Cap Value Index Admiral | VSIAX | Small Value | 18.94 | 13.37 | 7.84 | 10.11 | ✔️ | 17.00 | 0.85 | 9.93 | ✔️ | 🇺🇸 | ✔️ | 0.07 | ✔️ | 5 | 1-Low | Medium Risk |
| percentile rank | | | 56 | 29 | 27 | 20 | | | | | | | | | | | | |
| # of funds in category | | | 563 | 541 | 517 | 427 | | | | | | | | | 02-28-2026 | 02-15-2022 | 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 | |
| Alternative | | | | | | | | | | | | | | | | | | |
| 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 Core Plus Bond Inst | BCOIX | Core Plus Bond | 4.57 | 4.50 | 0.92 | 2.54 | ✔️ | 5.51 | 0.98 | 25.52 | ✔️ | — | — | 0.30 | ✔️ | 4 | 1-Low | - |
| percentile rank | | | 46 | 36 | 34 | 30 | | | | | | | | | | | | |
| # of funds in category | | | 622 | 582 | 540 | 430 | | | | | | | | | 02-28-2026 | 02-15-2022 | - | |

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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 | |
| American Century Inflation Adjs Bond R5 percentile rank # of funds in category | AIANX | Inflation-Protected Bond | 2.92 49 181 | 2.91 63 174 | 1.36 44 166 | 2.49 53 140 | ✔ | 4.47 | 1.05 | 18.52 | ✔ | — | — | 0.34 | ✔ | 3 | — | — |
| Baird Aggregate Bond Inst percentile rank # of funds in category | BAGIX | Intermediate-Term Bond | 4.35 41 551 | 4.12 24 515 | 0.55 22 468 | 2.12 18 345 | ✔ | 5.73 | 1.01 | 25.52 | ✔ | ☒ | — | 0.30 | ✔ | 4 | 1-Low | — |
| Lincoln Stable Value Account -LNGPA percentile rank # of funds in category | | Stable Value | — — 38 | — — — | — — — | — — — | — | — | — | 42.94 | ✔ | — | — | — | — | — | — | — |
| PIMCO Short-Term I2 percentile rank # of funds in category | PTSPX | Ultrashort Bond | 4.56 25 256 | 5.64 21 219 | 3.44 48 187 | 2.92 21 117 | ✔ | 0.50 | -0.03 | 15.25 | ✔ | — | — | 0.59 | ✖ | 3 | — | — |
| Target Date | | | | | | | | | | | | | | | | | | |
| Vanguard Target Retirement 2020 Fund percentile rank # of funds in category | VTWNX | Target Date | 10.37 64 150 | 8.90 62 136 | 4.41 53 123 | 6.64 50 84 | ✔ | 6.50 | 0.83 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | — |
| Vanguard Target Retirement 2025 Fund percentile rank # of funds in category | VTVX | Target Date | 13.02 15 191 | 10.64 14 176 | 5.36 15 162 | 7.63 22 114 | ✔ | 7.70 | 0.90 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2030 Fund percentile rank # of funds in category | VTHRX | Target Date | 14.79 9 275 | 11.80 9 258 | 6.09 13 243 | 8.40 27 168 | ✔ | 8.63 | 0.93 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2035 Fund percentile rank # of funds in category | VTHX | Target Date | 16.16 11 270 | 12.83 20 254 | 6.79 22 234 | 9.16 33 168 | ✔ | 9.20 | 0.92 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2040 Fund percentile rank # of funds in category | VFORX | Target Date | 17.57 24 270 | 13.85 33 251 | 7.50 37 236 | 9.91 32 168 | ✔ | 9.77 | 0.91 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2045 Fund percentile rank # of funds in category | VTVX | Target Date | 18.92 21 264 | 14.82 30 249 | 8.18 36 234 | 10.51 25 168 | ✔ | 10.34 | 0.91 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2050 Fund percentile rank # of funds in category | VVIFX | Target Date | 20.35 15 269 | 15.63 24 251 | 8.67 25 236 | 10.78 18 168 | ✔ | 10.83 | 0.93 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2055 Fund percentile rank # of funds in category | VFFVX | Target Date | 20.34 25 263 | 15.63 28 248 | 8.67 32 233 | 10.77 22 168 | ✔ | 10.86 | 0.92 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2060 Fund percentile rank # of funds in category | VVTSX | Target Date | 20.35 26 262 | 15.63 33 247 | 8.67 34 232 | 10.77 34 126 | ✔ | 10.85 | 1.16 | 13.11 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 1-Low | Low Risk |
| Vanguard Target Retirement 2065 Fund percentile rank # of funds in category | VLXVX | Target Date | 20.32 37 378 | 15.61 37 248 | 8.68 38 184 | — — — | ✔ | 10.84 | 1.16 | 8.72 | ✔ | — | ✔ | 0.08 | ✔ | 3 | 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 |
| Vanguard Target Retirement 2070 Fund | VSVNX | Target Date | 20.34 | 15.63 | - | - | ✔️ | 10.83 | 1.16 | 3.76 | ✔️ | - | ✔️ | 0.08 | ✔️ | 3 | - | Low Risk |
| percentile rank | | | 36 | 33 | - | - | | | | | | | | | | | | |
| # of funds in category | | | 378 | 248 | 184 | - | | | | | | | | | 02-28-2026 | - | 12-31-2022 | |
| Vanguard Target Retirement Income Fund | VTINX | Target Date | 9.30 | 7.85 | 3.71 | 5.04 | ✔️ | 5.85 | 0.94 | 13.11 | ✔️ | - | ✔️ | 0.08 | ✔️ | 4 | 1-Low | - |
| percentile rank | | | 47 | 48 | 48 | 45 | | | | | | | | | | | | |
| # of funds in category | | | 206 | 194 | 184 | 125 | | | | | | | | | 02-28-2026 | 02-15-2022 | - | |

| 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 |