

EAST WEST MANAGEMENT INSTITUTE 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	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	
Fidelity Contrafund	FCNTX	Large Growth	20.11	25.10	13.70	16.39	✓	13.71	0.83	35.56	✓	🇺🇸	✓	0.74	✓	1	1-Low	Low Risk
percentile rank			28	8	5	18												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	02-15-2022	12-31-2022	
American Funds Washington Mutual R6	RWMGX	Large Value	13.45	16.47	11.73	12.92	✓	10.40	0.74	28.77	✓	🇺🇸	✗	0.26	✓	3	1-Low	Low Risk
percentile rank			65	18	11	7												
# 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	
⚠ MFS Research International R4	MRSJX	Foreign Large Blend	18.15	10.64	5.58	8.23	✓	12.64	0.91	3.25	✓	🇺🇸	✓	0.74	✓	3	2-Basic	Low Risk
percentile rank			80	89	84	59												
# 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																		
⚠ BlackRock Inflation Protected Bond Instl	BPRIX	Inflation-Protected Bond	3.04	2.93	1.38	2.68	✓	4.28	1.00	2.09	✗	—	—	1.09	✗	3	-	-
percentile rank			31	63	42	19												
# of funds in category			181	174	166	140									10-31-2025	-	-	

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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	Commit. Level	Carbon Risk	
Vanguard Interm-Term Bond Index Adm	VBILX	Intermediate-Term Bond	4.90	4.00	0.60	2.03	✓	5.87	1.03	17.94	✓	☒	—	0.06	✓	2	1-Low	-
percentile rank			12	30	20	24												
# of funds in category			551	515	468	345									02-28-2026	02-15-2022	-	
Loomis Sayles Income N	LSBNX	Multisector Bond	5.95	6.68	2.75	3.63	✓	5.86	1.03	19.17	✓	—	—	0.59	✓	1	1-Low	-
percentile rank			39	45	49	62												
# of funds in category			396	379	345	253									09-30-2025	02-15-2022	-	
Target Date																		
Vanguard Target Retirement 2020 Fund	VTWNX	Target Date	10.37	8.90	4.41	6.64	✓	6.50	0.83	13.11	✓	—	✓	0.08	✓	3	1-Low	-
percentile rank			64	62	53	50												
# of funds in category			150	136	123	84									02-28-2026	02-15-2022	-	
Vanguard Target Retirement 2025 Fund	VTVX	Target Date	13.02	10.64	5.36	7.63	✓	7.70	0.90	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			15	14	15	22												
# of funds in category			191	176	162	114									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2030 Fund	VTHRX	Target Date	14.79	11.80	6.09	8.40	✓	8.63	0.93	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			9	9	13	27												
# of funds in category			275	258	243	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2035 Fund	VTHX	Target Date	16.16	12.83	6.79	9.16	✓	9.20	0.92	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			11	20	22	33												
# of funds in category			270	254	234	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2040 Fund	VFORX	Target Date	17.57	13.85	7.50	9.91	✓	9.77	0.91	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			24	33	37	32												
# of funds in category			270	251	236	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2045 Fund	VTIVX	Target Date	18.92	14.82	8.18	10.51	✓	10.34	0.91	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			21	30	36	25												
# of funds in category			264	249	234	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2050 Fund	VFIX	Target Date	20.35	15.63	8.67	10.78	✓	10.83	0.93	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			15	24	25	18												
# of funds in category			269	251	236	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2055 Fund	VFFVX	Target Date	20.34	15.63	8.67	10.77	✓	10.86	0.92	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			25	28	32	22												
# of funds in category			263	248	233	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2060 Fund	VTTSX	Target Date	20.35	15.63	8.67	10.77	✓	10.85	1.16	13.11	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			26	33	34	34												
# of funds in category			262	247	232	126									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2065 Fund	VLVX	Target Date	20.32	15.61	8.68	-	✓	10.84	1.16	8.72	✓	—	✓	0.08	✓	3	1-Low	Low Risk
percentile rank			37	37	38	-												
# of funds in category			378	248	184	-									02-28-2026	02-15-2022	12-31-2022	
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	-	

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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	