

FIRE FIGHTER SALES AND SERVICE CO

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 | | | | | | | | | | | | | | | | | | |
| American Funds Invmt Co of Amer R6 | RICGX | Large Blend | 18.51 | 20.42 | 13.03 | 13.52 | ✔️ | 12.02 | 0.97 | 34.10 | ✔️ | 🇺🇸 | ✔️ | 0.27 | ✔️ | 2 | - | Low Risk |
| percentile rank | | | 25 | 7 | 8 | 39 | | | | | | | | | | | | |
| # 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 | |
| ⚠️ American Funds AMCAP R6 | RAFGX | Large Growth | 15.63 | 16.18 | 7.88 | 11.97 | ❌ | 14.02 | 0.87 | 10.75 | ✔️ | 🇺🇸 | ✔️ | 0.33 | ✔️ | 2 | - | Low Risk |
| percentile rank | | | 56 | 76 | 71 | 88 | | | | | | | | | | | | |
| # of funds in category | | | 1,213 | 1,135 | 1,073 | 882 | | | | | | | | | 02-28-2026 | - | 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 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 | |
| Vanguard Mid-Cap Value Index Admiral | VMVAX | Mid-Cap Value | 17.21 | 13.73 | 8.86 | 10.24 | ✔️ | 14.36 | 0.93 | 2.66 | ❌ | 🇺🇸 | ✔️ | 0.07 | ✔️ | 4 | 1-Low | Medium Risk |
| percentile rank | | | 37 | 30 | 40 | 34 | | | | | | | | | | | | |
| # of funds in category | | | 482 | 455 | 432 | 354 | | | | | | | | | 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 | |
| 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 | |
| ⚠️ Vanguard International Value Inv | VTRIX | Foreign Large Value | 25.71 | 12.39 | 6.83 | 8.29 | ✔️ | 13.38 | 0.95 | 13.67 | ✔️ | 🇺🇸 | ❌ | 0.36 | ✔️ | 3 | - | Medium Risk |
| percentile rank | | | 72 | 93 | 96 | 71 | | | | | | | | | | | | |
| # of funds in category | | | 399 | 376 | 358 | 286 | | | | | | | | | 02-28-2026 | - | 12-31-2022 | |
| American Funds New Perspective R6 | RNPGX | Global Stock | 17.48 | 15.23 | 7.72 | 12.72 | ✔️ | 12.40 | 1.04 | 25.35 | ✔️ | - | ✔️ | 0.40 | ✔️ | 3 | 2-Basic | Low Risk |
| percentile rank | | | 21 | 29 | 25 | 20 | | | | | | | | | | | | |
| # of funds in category | | | 330 | 315 | 290 | 206 | | | | | | | | | 02-28-2026 | 02-15-2022 | 12-31-2022 | |

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| 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 |
| Alternative | | | | | | | | | | | | | | | | | | |
| PIMCO Commodity Real Return Strat I2 | PCRPX | Commodities Broad Basket | 30.64 | 13.45 | 13.33 | 8.59 | ✔ | 12.06 | 0.95 | 7.42 | ✔ | — | — | 1.00 | ✔ | 2 | - | - |
| percentile rank | | | 57 | 55 | 64 | 55 | | | | | | | | | | | | |
| # 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 | | | | | | | | | | | | | | | | | | |
| PIMCO International Bond (USD-Hdg) I-2 | PFBPX | Global Bond | 2.31 | 4.82 | 1.22 | 2.77 | ✔ | 3.70 | 0.52 | 11.52 | ✔ | — | — | 0.67 | ✔ | 4 | - | - |
| percentile rank | | | 92 | 21 | 23 | 16 | | | | | | | | | | | | |
| # of funds in category | | | 130 | 126 | 122 | 86 | | | | | | | | | 02-28-2026 | - | - | |
| BlackRock High Yield Instl | BHYIX | High Yield Bond | 7.77 | 8.86 | 4.72 | 6.21 | ✔ | 4.22 | 0.95 | 16.26 | ✔ | — | — | 0.58 | ✔ | - | 2-Basic | - |
| percentile rank | | | 13 | 13 | 15 | 12 | | | | | | | | | | | | |
| # of funds in category | | | 661 | 637 | 594 | 481 | | | | | | | | | | - | 02-15-2022 | - |
| American Century Inflation Adjs Bond R5 | AIANX | Inflation-Protected Bond | 2.92 | 2.91 | 1.36 | 2.49 | ✔ | 4.47 | 1.05 | 18.52 | ✔ | — | — | 0.34 | ✔ | 3 | - | - |
| percentile rank | | | 49 | 63 | 44 | 53 | | | | | | | | | | | | |
| # of funds in category | | | 181 | 174 | 166 | 140 | | | | | | | | | 05-31-2024 | - | - | |
| 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 I2 | PONPX | Multisector Bond | 6.80 | 7.35 | 3.71 | 4.74 | ✔ | 4.65 | 0.82 | 19.02 | ✔ | — | — | 0.64 | ✔ | 4 | - | - |
| percentile rank | | | 13 | 26 | 18 | 14 | | | | | | | | | | | | |
| # of funds in category | | | 396 | 379 | 345 | 253 | | | | | | | | | 02-28-2026 | - | - | |
| Federated Hermes Govt Ultrashort IS | FGUSX | Ultrashort Bond | 4.69 | 5.15 | 3.39 | 2.41 | ✖ | 0.64 | 0.10 | 28.74 | ✔ | — | — | 0.26 | ✔ | - | - | - |
| percentile rank | | | 18 | 54 | 54 | 70 | | | | | | | | | | | | |
| # of funds in category | | | 256 | 219 | 187 | 117 | | | | | | | | | | | | |
| 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 | VTTHX | 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 | |

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🔴 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 |
| 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 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |
| Vanguard Target Retirement 2045 Fund percentile rank # of funds in category | VTIVX | 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 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |
| Vanguard Target Retirement 2050 Fund percentile rank # of funds in category | VFIX | 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 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |
| 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 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |
| Vanguard Target Retirement 2060 Fund percentile rank # of funds in category | VTSX | 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 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |
| Vanguard Target Retirement 2065 Fund percentile rank # of funds in category | VLVX | Target Date | 20.32 37 378 | 15.61 37 248 | 8.68 38 184 | - - - | ✔️ | 10.84 | 1.16 | 8.72 | ✔️ | — | ✔️ | 0.08 | ✔️ | 3 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |
| Vanguard Target Retirement 2070 Fund percentile rank # of funds in category | VSVNX | Target Date | 20.34 36 378 | 15.63 33 248 | - - 184 | - - - | ✔️ | 10.83 | 1.16 | 3.76 | ✔️ | — | ✔️ | 0.08 | ✔️ | 3 02-28-2026 | - - | Low Risk 12-31-2022 |
| Vanguard Target Retirement Income Fund percentile rank # of funds in category | VTINX | Target Date | 9.30 47 206 | 7.85 48 194 | 3.71 48 184 | 5.04 45 125 | ✔️ | 5.85 | 0.94 | 13.11 | ✔️ | — | ✔️ | 0.08 | ✔️ | 4 02-28-2026 | 1-Low 02-15-2022 | - - |
| 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 02-28-2026 | 1-Low 02-15-2022 | Low Risk 12-31-2022 |