

FIRSTPRO RECRUITMENT LLC 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	Pass/ Fail	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated
US Stock																		
American Funds Invmt Co of Amer R6 percentile rank # of funds in category	RICGX	Large Blend	18.51 25 1,457	20.42 7 1,349	13.03 8 1,250	13.52 39 987	✔️	12.02	0.97	34.10	✔️	🏠	✔️	0.27	✔️	2	-	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
JPMorgan Large Cap Growth R6 percentile rank # of funds in category	JLGMX	Large Growth	13.47 68 1,213	20.19 39 1,135	10.90 32 1,073	18.28 6 882	✔️	15.64	1.01	21.67	✔️	🏠	✔️	0.44	✔️	2	2-Basic	Low Risk
DFA US Large Cap Value I percentile rank # of funds in category	DFLVX	Large Value	18.41 23 1,198	14.85 38 1,155	9.87 48 1,089	11.07 42 918	✔️	13.35	1.03	14.10	✔️	🏠	✔️	0.22	✔️	2	-	Medium Risk
Vanguard Mid-Cap Growth Index Admiral percentile rank # of funds in category	VMGMX	Mid-Cap Growth	5.92 70 584	10.47 48 566	4.42 32 545	10.68 43 460	✔️	16.88	0.92	2.66	❌	🏠	✔️	0.07	✔️	4	1-Low	Medium Risk
Vanguard Mid-Cap Value Index Admiral percentile rank # of funds in category	VMVAX	Mid-Cap Value	17.21 37 482	13.73 30 455	8.86 40 432	10.24 34 354	✔️	14.36	0.93	2.66	❌	🏠	✔️	0.07	✔️	4	1-Low	Medium Risk
Vanguard Small Cap Growth Index Admiral percentile rank # of funds in category	VSGAX	Small Growth	20.69 37 643	12.43 28 626	2.56 37 602	10.50 46 489	✔️	18.58	0.91	21.26	✔️	🏠	✔️	0.07	✔️	4	1-Low	Medium Risk
State St Russell Sm Cp® Val Indx NL CI 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 International Growth Adm percentile rank # of funds in category	VWILX	Foreign Large Growth	12.45 48 432	8.41 54 409	-0.10 78 382	10.40 1 268	✔️	15.82	0.99	16.27	✔️	🏠	✔️	0.26	✔️	3	-	Low Risk
⚠️ Vanguard International Value Inv percentile rank # of funds in category	VTRIX	Foreign Large Value	25.71 72 399	12.39 93 376	6.83 96 358	8.29 71 286	✔️	13.38	0.95	13.67	✔️	🏠	❌	0.36	✔️	3	-	Medium Risk
American Funds New Perspective R6 percentile rank # of funds in category	RNPGX	Global Stock	17.48 21 330	15.23 29 315	7.72 25 290	12.72 20 206	✔️	12.40	1.04	25.35	✔️	-	✔️	0.40	✔️	3	2-Basic	Low Risk

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Alternative																		
⊖ DWS Enhanced Commodity Strategy R6	SKRRX	Commodities Broad Basket	21.85	9.38	11.24	-	✔	10.41	0.80	16.01	✔	-	-	0.85	✔	3	-	-
percentile rank			87	89	90	-												
# 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																		
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	-	
PIMCO International Bond (USD-Hdg) Instl	PFORX	Global Bond	2.41	4.92	1.32	2.88	✔	3.70	0.52	11.52	✔	-	-	0.57	✔	4	-	-
percentile rank			89	20	19	15												
# of funds in category			130	126	122	86									02-28-2026	-	-	
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	7.10	7.81	4.10	5.38	✔	4.08	0.91	3.59	✔	-	-	0.12	✔	1	-	-
percentile rank			30	57	38	47												
# of funds in category			661	637	594	481									02-28-2026	-	-	
Vanguard Inflation-Protected Secs Adm	VAIPX	Inflation-Protected Bond	2.98	3.09	1.37	2.55	✔	4.30	1.01	4.39	✔	-	-	0.10	✔	3	-	-
percentile rank			38	46	43	44												
# of funds in category			181	174	166	140									02-28-2026	-	-	
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	-	
Lincoln Stable Value Account -LNGPA		Stable Value	-	-	-	-	-	-	-	42.94	✔	-	-	-	-	-	-	-
percentile rank			-	-	-	-												
# of funds in category			38	-	-	-												
Vanguard Ultra-Short-Term Bond Admiral	VUSFX	Ultrashort Bond	4.47	5.22	3.29	2.63	✔	0.69	0.10	6.37	✔	-	-	0.09	✔	3	-	-
percentile rank			33	50	69	49												
# of funds in category			256	219	187	117									02-28-2026	-	-	
Balanced																		
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	