

HARDMAN SUPPLY COMPANY 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	
American Funds Growth Fund of Amer R6	RGAGX	Large Growth	18.18	20.82	9.75	14.84	✔️	14.82	0.93	24.43	✔️	🇺🇸	✔️	0.29	✔️	2	1-Low	Low Risk
percentile rank			39	35	44	41												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	04-07-2022	12-31-2022	
DFA US Large Cap Value I	DFLVX	Large Value	18.41	14.85	9.87	11.07	✔️	13.35	1.03	14.10	✔️	🇺🇸	✔️	0.22	✔️	2	-	Medium Risk
percentile rank			23	38	48	42												
# 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	
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																		
DFA Emerging Markets I	DFEMX	Diversified Emerging Mkts	34.65	16.71	6.39	8.75	✔️	13.95	0.88	16.10	✔️	🇺🇸	✔️	0.36	✔️	2	-	Medium Risk
percentile rank			36	33	25	28												
# of funds in category			816	775	697	531									02-28-2026	-	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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															Updated	Updated	Updated	
⚠ BlackRock Inflation Protected Bond K percentile rank # of funds in category	BPLBX	Inflation-Protected Bond	3.07 31 181	2.99 52 174	1.43 35 166	2.74 16 140	✔	4.31	1.00	2.09	⊕	—	—	1.04	⊕	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 -L7NGPA percentile rank # of funds in category		Stable Value	- - 38	- - -	- - -	- - -	—	-	-	42.94	✔	—	—	-	-	-	-	-
Federated Hermes Govt Ultrashort R6 percentile rank # of funds in category	FGULX	Ultrashort Bond	4.71 16 256	5.17 53 219	3.41 51 187	2.43 70 117	✔	0.62	0.10	28.74	✔	—	—	0.24	✔	-	-	-

Balanced

BlackRock 20/80 Target Allocation K percentile rank # of funds in category	BKCPX	Target Risk	8.54 30 92	6.92 41 91	2.59 54 82	4.31 34 65	✔	6.55	1.18	10.85	✔	—	✔	0.31	✔	3	-	-
BlackRock 40/60 Target Allocation K percentile rank # of funds in category	BKMPX	Target Risk	11.70 16 230	9.28 32 223	4.45 42 214	6.51 24 178	✔	7.65	1.12	10.85	✔	—	✔	0.32	✔	3	-	Low Risk
BlackRock 60/40 Target Allocation K percentile rank # of funds in category	BKGPX	Target Risk	14.88 19 541	11.86 31 517	6.18 52 499	8.38 41 419	✔	8.97	1.06	10.85	✔	—	✔	0.32	✔	3	-	Low Risk
BlackRock 80/20 Target Allocation K percentile rank # of funds in category	BKAPX	Target Risk	17.90 28 128	14.23 29 128	7.94 31 122	10.25 23 105	✔	10.39	1.06	10.85	✔	—	✔	0.30	✔	4	-	Low Risk