

IRONWAVE TECHNOLOGIES LLC

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	
Franklin Growth R6	FIFRX	Large Growth	15.89	14.83	8.30	13.48	✓	13.17	0.81	9.92	✓	☒	✓	0.46	✓	4	1-Low	Low Risk
percentile rank			55	83	64	70												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	02-15-2022	12-31-2022	
American Century Value R6	AVUDX	Large Value	14.96	12.45	9.46	10.39	✓	12.38	0.94	17.59	✓	☒	✓	0.60	✓	3	-	Medium Risk
percentile rank			50	72	55	63												
# of funds in category			1,198	1,155	1,089	918									02-28-2026	-	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	
⚠ Franklin Small Cap Growth R6	FSMLX	Small Growth	18.93	11.69	0.30	10.94	✓	19.70	0.91	22.01	✓	☒	✓	0.66	✓	2	-	Medium Risk
percentile rank			44	33	64	36												
# of funds in category			643	626	602	489									02-28-2026	-	12-31-2022	
State St Russell Sm Cp® Val Indx NL Cl C		Small Value	28.06	13.73	5.74	9.60	✓	19.37	1.00	16.58	✓	☒	✓	0.05	✓	2	-	Medium Risk
percentile rank			15	24	62	35												
# of funds in category			563	541	517	427									02-28-2026	-	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	VGSIX	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 K	BPLBX	Inflation-Protected Bond	3.07	2.99	1.43	2.74	✓	4.31	1.00	2.09	✗	—	—	1.04	✗	3	-	-
percentile rank			31	52	35	16												
# of funds in category			181	174	166	140									10-31-2025	-	-	

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															Updated	Updated	Updated	
⚠ BlackRock Total Return K	MPHQX	Intermediate-Term Bond	5.27	3.97	0.45	2.22	✔	5.94	1.05	15.66	✔	—	—	0.37	✔	4	2-Basic	—
percentile rank			10	68	65	51												
# of funds in category			622	582	540	430									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																		
BlackRock 20/80 Target Allocation K	BKCPX	Target Risk	8.54	6.92	2.59	4.31	✔	6.55	1.18	10.85	✔	—	✔	0.31	✔	3	—	
percentile rank			30	41	54	34												
# of funds in category			92	91	82	65									02-28-2026	—	—	
BlackRock 40/60 Target Allocation K	BKMPX	Target Risk	11.70	9.28	4.45	6.51	✔	7.65	1.12	10.85	✔	—	✔	0.32	✔	3	—	
percentile rank			16	32	42	24												
# of funds in category			230	223	214	178									02-28-2026	—	09-30-2022	
BlackRock 60/40 Target Allocation K	BKGPX	Target Risk	14.88	11.86	6.18	8.38	✔	8.97	1.06	10.85	✔	—	✔	0.32	✔	3	—	
percentile rank			19	31	52	41												
# of funds in category			541	517	499	419									02-28-2026	—	12-31-2022	
BlackRock 80/20 Target Allocation K	BKAPX	Target Risk	17.90	14.23	7.94	10.25	✔	10.39	1.06	10.85	✔	—	✔	0.30	✔	4	—	
percentile rank			28	29	31	23												
# of funds in category			128	128	122	105									02-28-2026	—	12-31-2022	