

# THE INSTITUTE OF WORLD POLITICS 403

## 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
<b>US Stock</b>																		
Columbia Contrarian Core Inst3	COFYX	Large Blend	16.41	18.55	11.40	13.66	✔️	12.38	1.01	21.01	✔️	🏠	❌	0.61	✔️	3	1-Low	Low Risk
percentile rank			53	20	34	32												
# of funds in category			1,457	1,349	1,250	987									02-28-2026	03-11-2022	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	
MFS Growth R6	MFEKX	Large Growth	10.67	17.81	8.99	14.66	✔️	15.14	0.97	24.01	✔️	🏠	✔️	0.52	✔️	4	2-Basic	Low Risk
percentile rank			78	65	55	46												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	02-15-2022	12-31-2022	
Invesco Growth and Income R6	GIFFX	Large Value	16.91	15.54	10.45	11.49	✔️	13.12	1.00	23.10	✔️	🏠	✔️	0.42	✔️	3	-	Medium Risk
percentile rank			33	27	34	29												
# 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 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	
JPMorgan Small Cap Value R6	JSVUX	Small Value	26.03	13.33	6.38	9.09	✔️	18.36	0.94	15.42	✔️	🏠	✔️	0.74	✔️	2	-	Medium Risk
percentile rank			20	29	47	55												
# of funds in category			563	541	517	427									02-28-2026	-	12-31-2022	
<b>Non-US Stock</b>																		
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	
MFS International Equity R6	MIEIX	Foreign Large Growth	11.17	10.14	7.34	9.22	✔️	12.37	0.86	16.51	✔️	🏠	✔️	0.64	✔️	4	2-Basic	Low Risk
percentile rank			96	92	56	22												
# of funds in category			839	800	749	589									02-28-2026	02-15-2022	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 Capital World Gr&Inc R6	RWIGX	Global Stock	23.63	17.21	9.39	11.06	✔️	11.49	0.96	20.17	✔️	-	✔️	0.41	✔️	2	1-Low	Low Risk
percentile rank			14	14	37	32												
# of funds in category			347	322	316	226									02-28-2026	05-18-2022	12-31-2022	

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			1 Yr	3 Yr	5 Yr	10 Yr	Pass/ Fail	Std Dev 3 Yr %	Beta 3 Yr %	Tenure Yr %	Pass/ Fail	Style Box	Pass/ Fail	Exp Ratio	Pass/ Fail	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated
<b>Alternative</b>																		
Invesco Balanced-Risk Commodity Strat R6	IBRFX	Commodities Broad Basket	43.41	16.74	13.45	8.71	✔	11.52	0.85	15.34	✔	—	—	0.98	✔	-	-	-
percentile rank			1	14	57	52												
# of funds in category			127	118	112	83									-	-	-	
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	
<b>Fixed Income</b>																		
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	-	-	
BlackRock High Yield K	BRHYX	High Yield Bond	7.88	8.97	4.80	6.30	✔	4.30	0.97	16.26	✔	—	—	0.48	✔	-	2-Basic	-
percentile rank			12	11	12	11												
# of funds in category			661	637	594	481									-	02-15-2022	-	
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	-	-	-									-	-	-	
PIMCO Short-Term Instl	PTSHX	Ultrashort Bond	4.66	5.74	3.54	3.03	✔	0.50	-0.03	15.25	✔	—	—	0.49	✖	3	-	-
percentile rank			19	17	36	10												
# of funds in category			256	219	187	117									02-28-2026	-	-	
<b>Target Date</b>																		
JPMorgan SmartRetirement® 2025 R6	JNSYX	Target Date	10.66	9.46	4.54	6.82	✔	7.41	0.87	15.42	✔	—	✔	0.35	✔	3	-	-
percentile rank			72	62	71	72												
# of funds in category			191	176	162	114									02-28-2026	-	-	
JPMorgan SmartRetirement® 2030 R6	JSMYX	Target Date	12.45	10.85	5.46	7.84	✔	8.41	0.91	15.42	✔	—	✔	0.35	✔	4	-	Low Risk
percentile rank			59	50	48	59												
# of funds in category			275	258	243	168									02-28-2026	-	12-31-2022	
JPMorgan SmartRetirement® 2035 R6	SRJYX	Target Date	13.77	12.35	6.43	8.89	✔	9.35	0.93	15.42	✔	—	✔	0.39	✔	3	-	Low Risk
percentile rank			70	44	43	43												
# of funds in category			270	254	234	168									02-28-2026	-	12-31-2022	

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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	Pass/ Fail	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated
JPMorgan SmartRetirement® 2040 R6 percentile rank # of funds in category	SMTYX	Target Date	14.90 82 270	13.36 58 251	7.11 55 236	9.63 46 168	✔️	10.09	0.93	15.42	✔️	—	✔️	0.39	✔️	4	-	Low Risk
JPMorgan SmartRetirement® 2045 R6 percentile rank # of funds in category	JSAYX	Target Date	15.88 84 264	14.11 65 249	7.64 60 234	10.08 52 168	✔️	10.66	0.93	15.42	✔️	—	✔️	0.39	✔️	4	-	Low Risk
JPMorgan SmartRetirement® 2050 R6 percentile rank # of funds in category	JTSYX	Target Date	16.33 87 269	14.51 68 251	7.83 64 236	10.17 60 168	✔️	10.94	0.93	15.42	✔️	—	✔️	0.39	✔️	4	-	Low Risk
JPMorgan SmartRetirement® 2055 R6 percentile rank # of funds in category	JFFYX	Target Date	16.31 87 263	14.49 75 248	7.83 64 233	10.17 66 168	✔️	10.95	0.92	14.17	✔️	—	✔️	0.39	✔️	4	-	Low Risk
JPMorgan SmartRetirement® 2060 R6 percentile rank # of funds in category	JAKYX	Target Date	16.29 89 262	14.47 78 247	7.83 66 232	- - 126	✔️	10.94	1.15	9.59	✔️	—	✔️	0.39	✔️	4	-	Low Risk
JPMorgan SmartRetirement® 2065 R6 percentile rank # of funds in category	JSMOX	Target Date	16.20 90 378	14.28 81 248	- - 184	- - -	✔️	10.74	1.13	3.41	✔️	—	✔️	0.40	✔️	4	-	Low Risk
JPMorgan SmartRetirement® Income R6 percentile rank # of funds in category	JSIYX	Target Date	10.22 20 206	8.92 9 194	4.19 14 184	5.56 17 125	✔️	6.83	1.09	15.42	✔️	—	✔️	0.34	✔️	3	-	-

### Balanced

Invesco Equity and Income R6 percentile rank # of funds in category	IEIFX	Moderate Allocation	13.74 31 541	12.03 29 517	7.37 20 499	9.26 19 419	✔️	9.75	1.04	22.93	✔️	—	✔️	0.41	✔️	2	-	Medium Risk
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