

JUNIPER HEALTH RETIREMENT 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	Committ. 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
Fidelity 500 Index percentile rank # of funds in category	FXAIX	Large Blend Index	17.79 33 1,457	18.30 23 1,349	12.05 17 1,250	14.15 13 987	✔	12.05	1.00	17.17	✔	🇺🇸	✔	0.02	✔	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
JPMorgan US Value R6 percentile rank # of funds in category	VGINX	Large Value	12.74 70 1,198	13.41 61 1,155	10.16 41 1,089	11.85 21 918	✔	11.83	0.92	7.13	✔	🇺🇸	✔	0.44	✔	3	-	Medium Risk
MFS Mid Cap Growth R6 percentile rank # of funds in category	OTCKX	Mid-Cap Growth	3.42 80 584	8.03 68 566	2.60 47 545	10.86 39 460	✔	15.66	0.85	17.37	✔	🇺🇸	✔	0.65	✔	3	2-Basic	Low Risk
MFS Mid Cap Value R6 percentile rank # of funds in category	MVCKX	Mid-Cap Value	10.49 72 482	11.31 59 455	7.92 52 432	9.86 48 354	✔	14.68	0.95	17.37	✔	🇺🇸	✔	0.61	✔	3	-	Medium Risk
Nationwide Geneva Small Cap Gr R6 percentile rank # of funds in category	NWKCX	Small Growth	-3.37 92 643	3.23 87 626	-0.37 68 602	8.93 73 489	✔	17.32	0.79	16.81	✔	🇺🇸	✔	0.82	✔	3	-	Low Risk
Avantis® U.S. Small Cap Value Instl percentile rank # of funds in category	AVUVX	Small Value	29.37 9 563	16.20 7 541	10.74 3 517	- - 427	✔	19.55	0.98	6.33	✔	🇺🇸	✔	0.25	✔	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
⚠ MFS Research International R6 percentile rank # of funds in category	MRSKX	Foreign Large Blend	18.23 80 839	10.75 89 800	5.69 82 749	8.34 54 589	✔	12.64	0.91	3.25	✔	🇺🇸	✔	0.64	✔	3	2-Basic	Low Risk
Fidelity International Index percentile rank # of funds in category	FSPSX	Foreign Large Blend Index	23.40 45 839	14.60 44 800	8.59 25 749	8.82 36 589	✔	13.00	0.94	17.22	✔	🇺🇸	✔	0.04	✔	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
DFA International Value I percentile rank # of funds in category	DFIVX	Foreign Large Value	38.20 17 399	22.16 12 376	14.68 5 358	11.42 4 286	✔	12.90	0.88	16.10	✔	🇺🇸	✔	0.28	✔	1	-	Medium Risk

©2026 Morningstar Investment Management LLC. All Rights Reserved. Morningstar Investment Management LLC is a registered investment adviser and subsidiary of Morningstar, Inc. The services are either performed by Morningstar Investment Management or an affiliate. The data shown represents past performance which is no guarantee of future performance. The Morningstar name and logo are registered marks of Morningstar, Inc. This report is not complete without the accompanying disclosure. Please visit https://fiduciaryservices.morningstar.com/Disclosures/Fiduciary_Services_Report_Disclosure.pdf to view these disclosures.



JUNIPER HEALTH RETIREMENT 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	Commit. Level	Carbon Risk
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	

Alternative																		
PIMCO Commodity Real Ret Strat Instl	PCRIX	Commodities Broad Basket	30.78	13.56	13.44	8.70	✔	12.05	0.95	7.42	✔	—	—	0.90	✔	2	-	-
percentile rank			57	51	59	53												
# of funds in category			127	118	112	83									02-28-2026	-	-	
Principal Global Real Estate Sec R6	PGRSX	Global Real Estate	6.74	6.09	1.05	3.60	✔	15.66	1.00	18.51	✔	📊	✔	0.90	✔	3	-	Low Risk
percentile rank			73	63	61	35												
# of funds in category			174	173	169	146									02-28-2026	-	12-31-2022	

Fixed Income																		
PGIM Total Return Bond R6	PTRQX	Core Plus Bond	4.89	5.08	1.06	2.69	✔	5.65	1.00	23.43	✔	—	—	0.39	✔	3	-	-
percentile rank			22	14	27	23												
# of funds in category			622	582	540	430									02-28-2026	-	-	
AB Global Bond Z	ANAZX	Global Bond	2.98	3.73	0.55	1.92	✔	4.51	0.77	20.59	✔	—	—	0.51	✔	3	-	-
percentile rank			64	67	60	49												
# of funds in category			130	126	122	86									02-28-2026	-	-	
⚠ Federated Hermes Instl High Yield Bd R6	FIHLX	High Yield Bond	6.68	7.79	3.60	-	✔	4.50	1.01	23.43	✔	—	—	0.49	✔	1	-	-
percentile rank			47	58	65	-												
# of funds in category			661	637	594	481									05-31-2024	-	-	
Fidelity Inflation-Prot Bd Index	FIPDX	Inflation-Protected Bond	2.97	3.16	1.45	2.61	✔	4.16	0.97	11.87	✔	—	—	0.05	✔	3	-	-
percentile rank			41	38	27	38												
# of funds in category			181	174	166	140									02-28-2026	-	-	
Fidelity U.S. Bond Index	FXNAX	Intermediate-Term Bond	4.32	3.62	0.29	1.66	✔	5.61	1.00	11.87	✔	📊	—	0.03	✔	3	1-Low	-
percentile rank			46	56	51	57												
# 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	-	-	-												
Federated Hermes Govt Ultrashort R6	FGULX	Ultrashort Bond	4.71	5.17	3.41	2.43	✔	0.62	0.10	28.74	✔	—	—	0.24	✔	-	-	-
percentile rank			16	53	51	70												
# of funds in category			256	219	187	117												

Balanced																		
Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	Target Risk	11.12	8.93	4.04	5.80	✔	7.07	0.94	4.10	✔	📊	✔	0.10	✔	3	1-Low	-
percentile rank			35	29	43	28												
# of funds in category			250	239	231	193									02-28-2026	07-19-2023	-	
Vanguard LifeStrategy Growth Inv	VASGX	Target Risk	18.45	14.25	7.69	9.76	✔	10.08	0.94	4.10	✔	📊	✔	0.10	✔	3	1-Low	Low Risk
percentile rank			24	17	26	15												
# of funds in category			201	196	191	161									02-28-2026	07-19-2023	12-31-2022	

JUNIPER HEALTH RETIREMENT 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
Vanguard LifeStrategy Income Inv	VASIX	Target Risk	7.40	6.25	2.15	3.73	✔	5.80	0.91	4.10	✔	🏠	✔	0.10	✔	3	1-Low	-
percentile rank			58	70	84	64												
# of funds in category			93	90	85	74									02-28-2026	07-19-2023	-	
Vanguard LifeStrategy Mod Gr Inv Shrs	VSMGX	Target Risk	14.77	11.57	5.86	7.79	✔	8.53	0.93	4.10	✔	🏠	✔	0.10	✔	3	1-Low	Low Risk
percentile rank			47	38	44	21												
# of funds in category			455	449	434	357									02-28-2026	07-19-2023	12-31-2022	