

**MHSCMC 403(B) 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
<b>US Stock</b>																		
BNY Mellon S&P 500 Index	PEOPX	Large Blend Index	17.20	17.73	11.50	13.59	✓	12.05	1.00	5.43	✓	☐	✓	0.50	✓	3	-	Low Risk
percentile rank			46	41	31	37												
# of funds in category			1,457	1,349	1,250	987									02-28-2026	-	12-31-2022	
American Funds Washington Mutual R4	RWMEX	Large Value	13.06	16.06	11.34	12.53	✓	10.39	0.74	28.77	✓	☐	✗	0.60	✓	3	1-Low	Low Risk
percentile rank			67	23	17	11												
# of funds in category			1,198	1,155	1,089	918									02-28-2026	02-15-2022	12-31-2022	
BNY Mellon MidCap Index Inv	PESPX	Mid-Cap Blend	16.75	11.54	6.40	10.05	✓	16.20	1.04	5.43	✓	☐	✗	0.50	✓	2	-	Medium Risk
percentile rank			47	61	65	58												
# of funds in category			492	435	406	313									02-28-2026	-	12-31-2022	
MFS New Discovery R3	MNDHX	Small Growth	18.85	7.59	-1.28	10.59	✓	16.55	0.79	12.25	✓	☐	✓	1.21	✓	3	-	Medium Risk
percentile rank			45	68	77	42												
# of funds in category			643	626	602	489									02-28-2026	-	12-31-2022	
Nomura Small Cap Value A	DEV LX	Small Value	19.99	11.89	6.12	9.01	✓	17.64	0.88	13.76	✓	☐	✓	1.09	✓	4	-	Medium Risk
percentile rank			52	50	52	57												
# of funds in category			563	541	517	427									02-28-2026	-	12-31-2022	
<b>Non-US Stock</b>																		
American Funds New World R4	RNWEX	Diversified Emerging Mkts	24.16	13.45	4.77	9.35	✓	12.48	0.73	26.81	✓	☐	✓	0.92	✓	4	1-Low	Medium Risk
percentile rank			82	72	43	16												
# of funds in category			816	775	697	531									02-28-2026	02-15-2022	12-31-2022	
American Funds Intl Gr and Inc R4	RIGEX	Foreign Large Blend	27.75	15.00	7.69	8.68	✓	12.38	0.91	17.51	✓	☐	✓	0.88	✓	3	1-Low	Low Risk
percentile rank			20	36	47	42												
# of funds in category			839	800	749	589									02-28-2026	02-15-2022	12-31-2022	
BNY Mellon International Stock Index Inv	DIISX	Foreign Large Blend Index	22.82	13.65	7.84	8.12	✓	12.99	0.94	5.43	✓	☐	✓	0.60	✓	3	-	Low Risk
percentile rank			52	63	43	64												
# of funds in category			839	800	749	589									02-28-2026	-	12-31-2022	
<b>Alternative</b>																		
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>																		
BlackRock Inflation Protected Bond Inv A	BPRAX	Inflation-Protected Bond	2.71	2.68	1.12	2.43	✓	4.33	1.01	2.09	✗	-	-	1.34	✗	3	-	-
percentile rank			68	72	66	62												
# of funds in category			181	174	166	140									10-31-2025	-	-	
Baird Aggregate Bond Inv	BAGSX	Intermediate-Term Bond	4.21	3.86	0.30	1.87	✓	5.71	1.01	25.52	✓	☐	-	0.55	✓	4	1-Low	-
percentile rank			59	39	45	35												
# of funds in category			551	515	468	345									02-28-2026	02-15-2022	-	

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PIMCO Income A	PONAX	Multisector Bond	6.48	7.03	3.40	4.43		4.65	0.82	19.02		—	—	0.94		4	-	-
percentile rank			22	34	23	23									02-28-2026	-	-	
# of funds in category			396	379	345	253												
Federated Hermes Govt Ultrashort Svc	FEUSX	Ultrashort Bond	4.59	5.05	3.29	2.31		0.62	0.10	28.74		—	—	0.36		-	-	-
percentile rank			23	63	68	78												
# of funds in category			256	219	187	117												

**Balanced**

BlackRock Global Allocation Inv A	MDLOX	Global Allocation	16.72	11.23	4.65	7.03		9.50	1.01	9.25				1.11		2	-	Low Risk
percentile rank			29	45	78	50												
# of funds in category			455	449	434	357										02-28-2026	-	09-30-2022