

# NEUROSPINE CENTER OF WISCONSIN

## 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 |             |
| <b>US Stock</b>                        |        |                           |                               |       |       |       |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| ⓘ Vanguard Dividend Growth Inv         | VDIGX  | Large Blend               | 2.67                          | 6.55  | 6.65  | 10.18 | ⊕          | 10.86          | 0.73        | 3.75   | ✓         | ☒         | ⊕         | 0.22        | ✓                       | 4                     | 2-Basic             | Low Risk    |
| percentile rank                        |        |                           | 97                            | 100   | 93    | 94    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 1,457                         | 1,349 | 1,250 | 987   |            |                |             |        |           |           |           |             | 02-28-2026              | 02-15-2022            | 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          |             |
| 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          |             |
| Invesco Diversified Dividend R6        | LCEFX  | Large Value               | 14.03                         | 12.96 | 9.32  | 8.91  | ✓          | 11.79          | 0.91        | 10.10  | ✓         | ☒         | ✓         | 0.47        | ✓                       | 4                     | -                   | Medium Risk |
| percentile rank                        |        |                           | 60                            | 66    | 60    | 90    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 1,198                         | 1,155 | 1,089 | 918   |            |                |             |        |           |           |           |             | 02-28-2026              | -                     | 12-31-2022          |             |
| MFS Mid Cap Growth R6                  | OTCKX  | Mid-Cap Growth            | 3.42                          | 8.03  | 2.60  | 10.86 | ✓          | 15.66          | 0.85        | 17.37  | ✓         | ☒         | ✓         | 0.65        | ✓                       | 3                     | 2-Basic             | Low Risk    |
| percentile rank                        |        |                           | 80                            | 68    | 47    | 39    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 584                           | 566   | 545   | 460   |            |                |             |        |           |           |           |             | 02-28-2026              | 02-15-2022            | 12-31-2022          |             |
| Vanguard Selected Value Inv            | VASVX  | Mid-Cap Value             | 13.88                         | 12.92 | 8.94  | 10.40 | ✓          | 16.32          | 1.02        | 21.11  | ✓         | ☒         | ✓         | 0.34        | ✓                       | 4                     | -                   | Medium Risk |
| percentile rank                        |        |                           | 55                            | 43    | 38    | 30    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 482                           | 455   | 432   | 354   |            |                |             |        |           |           |           |             | 02-28-2026              | -                     | 12-31-2022          |             |
| PGIM Jennison Small Company R6         | PJSQX  | Small Growth              | 18.05                         | 10.18 | 5.48  | 10.99 | ✓          | 17.04          | 0.79        | 12.35  | ✓         | ☒         | ⊕         | 0.69        | ✓                       | 3                     | -                   | Medium Risk |
| percentile rank                        |        |                           | 49                            | 47    | 14    | 36    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 643                           | 626   | 602   | 489   |            |                |             |        |           |           |           |             | 02-28-2026              | -                     | 12-31-2022          |             |
| DFA US Small Cap Value I               | DFS VX | Small Value               | 26.13                         | 14.71 | 9.98  | 10.88 | ✓          | 19.17          | 0.97        | 14.10  | ✓         | ☒         | ✓         | 0.31        | ✓                       | 3                     | -                   | Medium Risk |
| percentile rank                        |        |                           | 20                            | 17    | 7     | 13    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 563                           | 541   | 517   | 427   |            |                |             |        |           |           |           |             | 02-28-2026              | -                     | 12-31-2022          |             |
| <b>Non-US Stock</b>                    |        |                           |                               |       |       |       |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| American Funds New World R6            | RNWGX  | Diversified Emerging Mkts | 24.59                         | 13.85 | 5.13  | 9.73  | ✓          | 12.48          | 0.73        | 26.81  | ✓         | ☒         | ✓         | 0.57        | ✓                       | 4                     | 1-Low               | Medium Risk |
| percentile rank                        |        |                           | 81                            | 67    | 38    | 12    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 816                           | 775   | 697   | 531   |            |                |             |        |           |           |           |             | 02-28-2026              | 02-15-2022            | 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          |             |
| ⓘ Invesco International Growth R6      | OIGIX  | Foreign Large Growth      | 6.76                          | 5.07  | 0.80  | 5.08  | ✓          | 14.56          | 0.99        | 14.01  | ✓         | ☒         | ✓         | 0.75        | ✓                       | 4                     | -                   | Low Risk    |
| percentile rank                        |        |                           | 73                            | 78    | 72    | 91    |            |                |             |        |           |           |           |             |                         |                       |                     |             |
| # of funds in category                 |        |                           | 432                           | 409   | 382   | 268   |            |                |             |        |           |           |           |             | 02-28-2026              | -                     | 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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| 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 Yr % | Pass/ Fail | Style Box | Pass/ Fail | Exp Ratio   | Pass/ Fail | Sustain. Rating Updated | Commit. Level Updated | Carbon Risk Updated |
| <b>Alternative</b>                       |        |                          |                               |       |       |       |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| 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 | -                       | -                     |                     |
| 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>                      |        |                          |                               |       |       |       |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| 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 | -                       | -                     |                     |
| Eaton Vance Income Fund of Boston R6     | EIBRX  | High Yield Bond          | 7.13                          | 7.70  | 4.71  | 5.56  | ✔          | 3.97           | 0.89        | 11.41       | ✔          | —         | —          | 0.62        | ✔          | -                       | -                     | -                   |
| percentile rank                          |        |                          | 29                            | 61    | 16    | 34    |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| # of funds in category                   |        |                          | 661                           | 637   | 594   | 481   |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| 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              | -                     |                     |
| PIMCO Income Instl                       | PIMIX  | Multisector Bond         | 6.91                          | 7.46  | 3.81  | 4.85  | ✔          | 4.65           | 0.82        | 19.02       | ✔          | —         | —          | 0.54        | ✔          | 4                       | -                     | -                   |
| percentile rank                          |        |                          | 11                            | 22    | 16    | 13    |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| # of funds in category                   |        |                          | 396                           | 379   | 345   | 253   |            |                |             |             |            |           |            |             | 02-28-2026 | -                       | -                     |                     |
| 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   |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| <b>Balanced</b>                          |        |                          |                               |       |       |       |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| American Funds American Balanced R6      | RLBGX  | Moderate Allocation      | 17.76                         | 14.65 | 8.86  | 9.82  | ✔          | 8.74           | 1.02        | 27.26       | ✔          | —         | ✔          | 0.25        | ✔          | 3                       | 1-Low                 | Low Risk            |
| percentile rank                          |        |                          | 8                             | 5     | 4     | 8     |            |                |             |             |            |           |            |             |            |                         |                       |                     |
| # of funds in category                   |        |                          | 541                           | 517   | 499   | 419   |            |                |             |             |            |           |            |             | 02-28-2026 | 02-15-2022              | 12-31-2022            |                     |