

PRIMARY CARE DEVELOPMENT

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 Yr %	Pass/ Fail	Style Box	Pass/ Fail	Exp Ratio	Sustain. Rating Updated	Commit. Level Updated	Carbon Risk Updated	
US Stock																		
JPMorgan US Equity R6	JUEMX	Large Blend	12.23	15.92	10.72	14.18	✓	12.69	1.04	11.62	✓	🇺🇸	✖	0.44	✓	3	2-Basic	Low Risk
percentile rank			77	61	51	12												
# 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	
Vanguard Growth Index Admiral	VIGAX	Large Growth	18.25	21.13	11.80	16.12	✓	15.54	1.02	31.27	✓	🇺🇸	✓	0.05	✓	3	1-Low	Low Risk
percentile rank			38	32	24	20												
# of funds in category			1,213	1,135	1,073	882									02-28-2026	02-15-2022	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	
Allspring Small Company Growth Inst	WSCGX	Small Growth	15.17	7.15	1.84	9.61	✓	17.71	0.85	31.41	✓	🇺🇸	✓	0.94	✓	3	-	Low Risk
percentile rank			68	72	45	61												
# of funds in category			643	626	602	489									02-28-2026	-	12-31-2022	
Vanguard Small Cap Value Index Admiral	VSIAX	Small Value	18.94	13.37	7.84	10.11	✓	17.00	0.85	9.93	✓	🇺🇸	✓	0.07	✓	5	1-Low	Medium Risk
percentile rank			56	29	27	20												
# of funds in category			563	541	517	427									02-28-2026	02-15-2022	12-31-2022	
Non-US Stock																		
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	
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	
⚠ Invesco International Growth Y	OIGYX	Foreign Large Growth	6.63	4.95	0.66	4.92	✓	14.55	0.99	14.01	✓	🇺🇸	✓	0.90	✓	4	-	Low Risk
percentile rank			73	79	73	93												
# 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 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	

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																Updated	Updated	Updated
Alternative																		
PIMCO Commodity Real Return Strat I2	PCRPX	Commodities Broad Basket	30.64	13.45	13.33	8.59	✔	12.06	0.95	7.42	✔	—	—	1.00	✔	2	-	-
percentile rank			57	55	64	55												
# 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	
Fixed Income																		
PIMCO International Bond (USD-Hdg) I-2	PFBPX	Global Bond	2.31	4.82	1.22	2.77	✔	3.70	0.52	11.52	✔	—	—	0.67	✔	4	-	-
percentile rank			92	21	23	16												
# of funds in category			130	126	122	86									02-28-2026	-	-	
Eaton Vance Income Fund of Boston I	EIBIX	High Yield Bond	7.03	7.60	4.61	5.49	✔	3.94	0.88	11.41	✔	—	—	0.71	✔	-	-	-
percentile rank			32	66	19	40												
# of funds in category			661	637	594	481												
⚠ BlackRock Inflation Protected Bond Instl	BPRIX	Inflation-Protected Bond	3.04	2.93	1.38	2.68	✔	4.28	1.00	2.09	✖	—	—	1.09	✖	3	-	-
percentile rank			31	63	42	19												
# of funds in category			181	174	166	140									10-31-2025	-	-	
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 I2	PONPX	Multisector Bond	6.80	7.35	3.71	4.74	✔	4.65	0.82	19.02	✔	—	—	0.64	✔	4	-	-
percentile rank			13	26	18	14												
# of funds in category			396	379	345	253									02-28-2026	-	-	
Lincoln NY Stable Value Account -LYGPA		Stable Value	-	-	-	-	—	-	-	29.52	✔	—	—	-	-	-	-	-
percentile rank			-	-	-	-												
# of funds in category			38	-	-	-												
Federated Hermes Govt Ultrashort IS	FGUSX	Ultrashort Bond	4.69	5.15	3.39	2.41	✖	0.64	0.10	28.74	✔	—	—	0.26	✔	-	-	-
percentile rank			18	54	54	70												
# of funds in category			256	219	187	117												
Target Date																		
Vanguard Target Retirement 2020 Fund	VTWNX	Target Date	10.37	8.90	4.41	6.64	✔	6.50	0.83	13.11	✔	—	✔	0.08	✔	3	1-Low	-
percentile rank			64	62	53	50												
# of funds in category			150	136	123	84									02-28-2026	02-15-2022	-	
Vanguard Target Retirement 2025 Fund	VTTVX	Target Date	13.02	10.64	5.36	7.63	✔	7.70	0.90	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			15	14	15	22												
# of funds in category			191	176	162	114									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2030 Fund	VTHRX	Target Date	14.79	11.80	6.09	8.40	✔	8.63	0.93	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			9	9	13	27												
# of funds in category			275	258	243	168									02-28-2026	02-15-2022	12-31-2022	

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Vanguard Target Retirement 2035 Fund	VTHX	Target Date	16.16	12.83	6.79	9.16	✔	9.20	0.92	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			11	20	22	33												
# of funds in category			270	254	234	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2040 Fund	VFORX	Target Date	17.57	13.85	7.50	9.91	✔	9.77	0.91	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			24	33	37	32												
# of funds in category			270	251	236	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2045 Fund	VTIVX	Target Date	18.92	14.82	8.18	10.51	✔	10.34	0.91	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			21	30	36	25												
# of funds in category			264	249	234	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2050 Fund	VFIFX	Target Date	20.35	15.63	8.67	10.78	✔	10.83	0.93	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			15	24	25	18												
# of funds in category			269	251	236	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2055 Fund	VFFVX	Target Date	20.34	15.63	8.67	10.77	✔	10.86	0.92	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			25	28	32	22												
# of funds in category			263	248	233	168									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2060 Fund	VITSX	Target Date	20.35	15.63	8.67	10.77	✔	10.85	1.16	13.11	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			26	33	34	34												
# of funds in category			262	247	232	126									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2065 Fund	VLXVX	Target Date	20.32	15.61	8.68	-	✔	10.84	1.16	8.72	✔	—	✔	0.08	✔	3	1-Low	Low Risk
percentile rank			37	37	38	-												
# of funds in category			378	248	184	-									02-28-2026	02-15-2022	12-31-2022	
Vanguard Target Retirement 2070 Fund	VSVNX	Target Date	20.34	15.63	-	-	✔	10.83	1.16	3.76	✔	—	✔	0.08	✔	3	-	Low Risk
percentile rank			36	33	-	-												
# of funds in category			378	248	184	-									02-28-2026	-	12-31-2022	
Vanguard Target Retirement Income Fund	VTINX	Target Date	9.30	7.85	3.71	5.04	✔	5.85	0.94	13.11	✔	—	✔	0.08	✔	4	1-Low	-
percentile rank			47	48	48	45												
# of funds in category			206	194	184	125									02-28-2026	02-15-2022	-	
Balanced																		
BlackRock Global Allocation Instl	MALOX	Global Allocation	17.05	11.49	4.91	7.31	✔	9.48	1.00	9.25	✔	🇺🇸	✔	0.87	✔	2	-	Low Risk
percentile rank			28	40	71	40												
# of funds in category			455	449	434	357									02-28-2026	-	09-30-2022	