

STANDARD SOLAR INC 401K

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	
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
Vanguard 500 Index Admiral percentile rank # of funds in category	VFIAX	Large Blend Index	17.75 34 1,457	18.27 25 1,349	12.02 19 1,250	14.12 15 987	✔	12.06	1.00	8.34	✔	🇺🇸	✔	0.04	✔	3	1-Low	Low Risk
⚠ Brown Advisory Sustainable Growth I percentile rank # of funds in category	BAFWX	Large Growth	0.79 94 1,213	9.90 95 1,135	6.36 82 1,073	13.87 61 882	✔	16.04	1.01	13.76	✔	🇺🇸	✔	0.60	✔	4	3-Advanced	Low Risk
Vanguard Value Index Adm percentile rank # of funds in category	VIAX	Large Value	16.03 40 1,198	15.07 34 1,155	10.98 24 1,089	11.85 21 918	✔	12.01	0.94	31.27	✔	🇺🇸	✔	0.05	✔	3	1-Low	Medium Risk
Vanguard Mid-Cap Growth Index Admiral percentile rank # of funds in category	VMGMX	Mid-Cap Growth	5.92 70 584	10.47 48 566	4.42 32 545	10.68 43 460	✔	16.88	0.92	2.66	✖	🇺🇸	✔	0.07	✔	4	1-Low	Medium Risk
Vanguard Mid-Cap Value Index Admiral percentile rank # of funds in category	VMVAX	Mid-Cap Value	17.21 37 482	13.73 30 455	8.86 40 432	10.24 34 354	✔	14.36	0.93	2.66	✖	🇺🇸	✔	0.07	✔	4	1-Low	Medium Risk
Vanguard Small Cap Growth Index Admiral percentile rank # of funds in category	VSGAX	Small Growth	20.69 37 643	12.43 28 626	2.56 37 602	10.50 46 489	✔	18.58	0.91	21.26	✔	🇺🇸	✔	0.07	✔	4	1-Low	Medium Risk
Vanguard Small Cap Value Index Admiral percentile rank # of funds in category	VSIAX	Small Value	18.94 56 563	13.37 29 541	7.84 27 517	10.11 20 427	✔	17.00	0.85	9.93	✔	🇺🇸	✔	0.07	✔	5	1-Low	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
Hartford Schroders International Stk SDR percentile rank # of funds in category	SCIJX	Foreign Large Blend	14.51 90 839	11.45 85 800	5.94 79 749	9.64 12 589	✔	12.34	0.87	16.09	✔	🇺🇸	✖	0.69	✔	4	-	Low Risk
Vanguard Developed Markets Index Admiral percentile rank # of funds in category	VTMGX	Foreign Large Blend Index	29.60 12 839	15.96 22 800	8.80 22 749	9.20 22 589	✔	13.68	1.00	13.11	✔	🇺🇸	✔	0.05	✔	2	1-Low	Low Risk
American Funds EUPAC R6 percentile rank # of funds in category	RERGX	Foreign Large Growth	22.30 16 432	11.67 25 409	4.08 40 382	8.40 36 268	✔	13.26	0.93	24.85	✔	🇺🇸	✔	0.47	✔	2	1-Low	Medium Risk
Causeway International Value Instl percentile rank # of funds in category	CIVIX	Foreign Large Value	20.61 90 399	15.40 78 376	10.78 54 358	9.43 43 286	✔	14.51	1.01	24.44	✔	🇺🇸	✖	0.85	✔	4	-	Low Risk

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Vanguard Total World Stock Index Admiral	VTWAX	Global Stock	21.36	16.76	9.46	-	✓	11.66	0.99	13.11	✓	-	✓	0.09	✓	2	1-Low	Low Risk
percentile rank			27	26	34	-												
# of funds in category			347	322	316	226									02-28-2026	02-15-2022	12-31-2022	

Alternative																		
⊖ DWS Enhanced Commodity Strategy R6	SKRRX	Commodities Broad Basket	21.85	9.38	11.24	-	✓	10.41	0.80	16.01	✓	-	-	0.85	✓	3	-	-
percentile rank			87	89	90	-												
# 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) 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	-	-	
Vanguard High-Yield Corporate Adm	VWEAX	High Yield Bond	7.10	7.81	4.10	5.38	✓	4.08	0.91	3.59	✓	-	-	0.12	✓	1	-	-
percentile rank			30	57	38	47												
# of funds in category			661	637	594	481									02-28-2026	-	-	
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	-	
Nuveen Core Impact Bond R6	TSBIX	Intermediate-Term Bond	4.86	4.28	0.52	2.07	✓	5.54	0.98	13.53	✓	⊠	-	0.35	✓	4	4-Leader	-
percentile rank			14	14	24	21												
# of funds in category			551	515	468	345									05-31-2025	02-15-2022	-	
Lincoln Stable Value Account -LNGPA		Stable Value	-	-	-	-	-	-	-	42.94	✓	-	-	-	-	-	-	-
percentile rank			-	-	-	-												
# of funds in category			38	-	-	-												
Vanguard Ultra-Short-Term Bond Admiral	VUSFX	Ultrashort Bond	4.47	5.22	3.29	2.63	✓	0.69	0.10	6.37	✓	-	-	0.09	✓	3	-	-
percentile rank			33	50	69	49												
# of funds in category			256	219	187	117									02-28-2026	-	-	

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	

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																	Updated	Updated	Updated
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		
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	VFIX	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	VTSX	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

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	
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	