

TECHBRIDGE GIRLS 403B 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
US Stock																		
American Funds Invmt Co of Amer R6 percentile rank	RICGX	Large Blend	18.51 25	20.42 7	13.03 8	13.52 39		12.02	0.97	34.10				0.27		2	-	Low Risk
# of funds in category			1,457	1,349	1,250	987									02-28-2026	-	12-31-2022	
Vanguard Total Stock Mkt Idx Adm percentile rank	VTSAX	Large Blend Index	18.18 28	17.84 38	10.76 49	13.67 32		12.60	1.04	9.93				0.04		2	1-Low	Low Risk
# of funds in category			1,457	1,349	1,250	987									02-28-2026	02-15-2022	12-31-2022	
iShares Russell Mid-Cap Index K percentile rank	BRMKX	Mid-Cap Blend	15.96 53	13.32 33	7.26 42	10.89 26		15.29	1.00	9.98				0.04		3	-	Medium Risk
# of funds in category			492	435	406	313									02-28-2026	-	12-31-2022	
Vanguard Small Cap Index Admiral Shares percentile rank	VSMAX	Small Blend	19.73 52	13.02 27	5.67 38	10.53 22		17.36	0.88	9.93				0.05		4	1-Low	Medium Risk
# of funds in category			699	663	639	514									02-28-2026	02-15-2022	12-31-2022	
Non-US Stock																		
American Funds Intl Gr and Inc R6 percentile rank	RIGGX	Foreign Large Blend	28.19 17	15.39 29	8.07 38	9.06 27		12.39	0.91	17.51				0.53		3	1-Low	Low Risk
# of funds in category			839	800	749	589									02-28-2026	02-15-2022	12-31-2022	
Fidelity Intl Sustainability Idx percentile rank	FNIDX	Foreign Large Blend Index	24.48 38	13.61 64	5.86 80	- -		12.35	0.91	8.90				0.20		3	-	Low Risk
# of funds in category			839	800	749	589									02-28-2026	-	12-31-2022	
Fixed Income																		
PIMCO Real Return Instl percentile rank	PRRIX	Inflation- Protected Bond	3.13 28	3.72 20	1.64 19	2.95 6		4.48	1.04	6.31		-	-	0.55		3	-	-
# of funds in category			181	174	166	140									02-28-2026	-	-	
Fidelity U.S. Bond Index percentile rank	FXNAX	Intermediate- Term Bond	4.32 46	3.62 56	0.29 51	1.66 57		5.61	1.00	11.87			-	0.03		3	1-Low	-
# of funds in category			551	515	468	345									02-28-2026	02-15-2022	-	
Lincoln Stable Value Account -LNGPA percentile rank		Stable Value	- -	- -	- -	- -	-	-	-	42.94		-	-	-	-	-	-	-
# of funds in category			38	-	-	-									-	-	-	
Baird Ultra Short Bond Institutional percentile rank	BUBIX	Ultrashort Bond	4.45 38	5.29 45	3.60 28	2.72 37		0.36	0.04	12.25		-	-	0.15		4	1-Low	-
# of funds in category			256	219	187	117									02-28-2026	02-15-2022	-	
Balanced																		
BlackRock 20/80 Target Allocation K percentile rank	BKCPX	Target Risk	8.54 30	6.92 41	2.59 54	4.31 34		6.55	1.18	10.85		-		0.31		3	-	-
# of funds in category			92	91	82	65									02-28-2026	-	-	

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														Updated	Updated	Updated		
BlackRock 40/60 Target Allocation K percentile rank	BKMPX	Target Risk	11.70	9.28	4.45	6.51	✔	7.65	1.12	10.85	✔	—	✔	0.32	✔	3	-	Low Risk
# of funds in category			230	223	214	178									02-28-2026	-	09-30-2022	
BlackRock 60/40 Target Allocation K percentile rank	BKGPX	Target Risk	14.88	11.86	6.18	8.38	✔	8.97	1.06	10.85	✔	—	✔	0.32	✔	3	-	Low Risk
# of funds in category			541	517	499	419									02-28-2026	-	12-31-2022	
BlackRock 80/20 Target Allocation K percentile rank	BKAPX	Target Risk	17.90	14.23	7.94	10.25	✔	10.39	1.06	10.85	✔	—	✔	0.30	✔	4	-	Low Risk
# of funds in category			128	128	122	105									02-28-2026	-	12-31-2022	