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# Mesirow 3(38) Lineup – Everyday 401(k)

## 3Q2025

# Performance

Investment Option	Category	QTR	YTD	1-year	3-year	5-year	10-year	Since Inception	Inception Date	Net Expense Ratio	Gross Expense Ratio	7 Day Yield	QTR End Performance As Of Date
<b>Core-Large Cap Domestic Equity</b>													
Fidelity US Sustainability Index Fund (FITLX)		8.28%	14.42%	16.57%	25.24%	16.45%	—	15.15%	05.2017	0.11%	0.11%	—	09.2025
Category Percentile Rank	Large Core	15	36	39	17	18	—	—					09.2025
Russell 1000 TR USD		7.99%	14.60%	17.75%	24.64%	15.99%	15.04%	12.35%	12.1978				09.2025
JPMorgan Equity Index Fund R6 (OGFAX)		8.12%	14.79%	17.55%	24.89%	16.41%	15.24%	15.10%	09.2016	0.05%	0.12%	—	09.2025
Category Percentile Rank	Large Core	21	26	22	21	20	—	—					09.2025
Russell 1000 TR USD		7.99%	14.60%	17.75%	24.64%	15.99%	15.04%	12.35%	12.1978				09.2025
JPMorgan US Equity Fund R6 (JUEMX)		8.61%	14.10%	15.46%	24.25%	16.52%	15.74%	14.87%	11.2010	0.44%	0.47%	—	09.2025
Category Percentile Rank	Large Core	11	44	49	34	17	4	—					09.2025
Russell 1000 TR USD		7.99%	14.60%	17.75%	24.64%	15.99%	15.04%	12.35%	12.1978				09.2025
JPMorgan Large Cap Growth Fund R6 (JLGMX)		9.29%	16.50%	22.70%	29.77%	15.88%	19.64%	17.43%	11.2010	0.44%	0.50%	—	09.2025
Category Percentile Rank	Large Growth	24	28	34	37	21	4	—					09.2025
Russell 1000 Growth TR USD		10.51%	17.24%	25.53%	31.61%	17.58%	18.83%	12.56%	01.1987				09.2025
JPMorgan Equity Income Fund R6 (OIEJX)		5.43%	12.13%	9.90%	14.51%	13.11%	11.44%	11.74%	01.2012	0.45%	0.45%	—	09.2025
Category Percentile Rank	Large Value	47	44	50	81	68	30	—					09.2025
Russell 1000 Value TR USD		5.33%	11.65%	9.44%	16.96%	13.88%	10.72%	11.70%	01.1987				09.2025
<b>Core-Small Cap Domestic Equity</b>													
JPMorgan US Small Company Fund R6 (JUSMX)		10.67%	7.66%	7.15%	14.66%	12.82%	9.53%	11.35%	11.2011	0.72%	0.72%	—	09.2025
Category Percentile Rank	Small Core	22	41	40	46	41	49	—					09.2025
Russell 2000 TR USD		12.39%	10.39%	10.76%	15.21%	11.56%	9.77%	11.03%	01.1984				09.2025

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# Performance

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<b>Core-Large Cap Foreign Equity</b>													
JPMorgan International Equity Fund R6 (JNEMX)		2.72%	23.58%	12.67%	20.32%	9.19%	8.15%	6.73%	11.2010	0.50%	0.60%	—	09.2025
Category Percentile Rank	Intl Large Core	84	72	82	69	78	38	—					09.2025
MSCI EAFE NR USD		4.77%	25.14%	14.99%	21.70%	11.15%	8.17%	8.63%	03.1986				09.2025
<b>Core-Domestic Bonds</b>													
JPMorgan Core Bond Fund R6 (JCBUX)		2.02%	6.43%	3.26%	5.25%	0.27%	2.25%	3.67%	02.2005	0.33%	0.34%	—	09.2025
Category Percentile Rank	Interm-Term Core Bond	49	16	21	28	13	17	—					09.2025
Bloomberg US Agg Bond TR USD		2.03%	6.13%	2.88%	4.93%	-0.45%	1.84%	6.53%	01.1986				09.2025
JPMorgan Government Bond Fund R6 (OGGYX)		1.89%	5.98%	2.86%	4.25%	-0.60%	1.49%	1.19%	08.2016	0.30%	0.39%	—	09.2025
Category Percentile Rank	Mortgage-Backed Bond	71	69	61	66	64	—	—					09.2025
Bloomberg US MBS TR USD		2.43%	6.76%	3.39%	5.05%	-0.14%	1.41%	6.47%	01.1976				09.2025
<b>Core-Cash Equivalents</b>													
JPMorgan US Government Money Market Fund Inst (IJGXX)		1.04%	3.16%	4.36%	4.71%	2.93%	1.97%	1.71%	02.2005	0.21%	0.22%	4.06%	09.2025
Category Percentile Rank	Taxable Money Market	28	24	24	23	20	13	—					09.2025
FTSE Treasury Bill 3 Mon USD		1.11%	3.34%	4.61%	4.98%	3.10%	2.12%	4.36%	12.1977				09.2025
<b>Supplemental-Target Date and Target Risk</b>													
JPMorgan SmartRetirement 2025 Fund R6 (JNSYX)		4.18%	10.80%	8.40%	12.97%	6.64%	7.09%	6.23%	11.2014	0.35%	0.37%	—	09.2025
Category Percentile Rank	Target Date 2025	58	67	71	53	64	64	—					09.2025

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S&P Target Date 2025 TR USD		4.54%	11.64%	9.41%	13.31%	7.47%	7.66%	5.77%	09.2008				09.2025
JPMorgan SmartRetirement 2030 Fund R6 (JSMYX)		4.82%	12.33%	9.80%	15.06%	8.10%	8.12%	7.09%	11.2014	0.35%	0.37%	—	09.2025
Category Percentile Rank	Target Date 2030	39	43	50	33	32	54	—					09.2025
S&P Target Date 2030 TR USD		5.02%	12.55%	10.37%	15.06%	8.74%	8.53%	6.12%	09.2008				09.2025
JPMorgan SmartRetirement 2035 Fund R6 (SRJYX)		5.11%	13.42%	11.09%	17.08%	9.86%	9.20%	8.02%	11.2014	0.40%	0.41%	—	09.2025
Category Percentile Rank	Target Date 2035	57	50	56	32	20	51	—					09.2025
S&P Target Date 2035 TR USD		5.61%	13.91%	11.72%	17.03%	10.16%	9.45%	6.49%	09.2008				09.2025
JPMorgan SmartRetirement 2040 Fund R6 (SMTYX)		5.51%	14.40%	12.14%	18.59%	11.03%	9.96%	8.67%	11.2014	0.40%	0.41%	—	09.2025
Category Percentile Rank	Target Date 2040	65	56	69	43	28	54	—					09.2025
S&P Target Date 2040 TR USD		6.19%	15.00%	12.96%	18.74%	11.34%	10.18%	6.79%	09.2008				09.2025
JPMorgan SmartRetirement 2045 Fund R6 (JSAYX)		5.82%	15.08%	12.88%	19.72%	11.95%	10.42%	9.09%	11.2014	0.40%	0.42%	—	09.2025
Category Percentile Rank	Target Date 2045	72	60	73	47	24	54	—					09.2025
S&P Target Date 2045 TR USD		6.57%	16.04%	13.84%	19.90%	12.10%	10.66%	8.09%	09.2008				09.2025
JPMorgan SmartRetirement 2050 Fund R6 (JTSYX)		6.04%	15.54%	13.40%	20.22%	12.17%	10.52%	9.19%	11.2014	0.41%	0.43%	—	09.2025
Category Percentile Rank	Target Date 2050	71	58	71	47	29	57	—					09.2025
S&P Target Date 2050 TR USD		6.79%	16.09%	14.15%	20.41%	12.47%	10.93%	8.10%	06.2012				09.2025
JPMorgan SmartRetirement 2055 Fund R6 (JFFYX)		5.98%	15.53%	13.37%	20.19%	12.17%	10.53%	9.20%	11.2014	0.41%	0.43%	—	09.2025
Category Percentile Rank	Target Date 2055	72	70	74	53	35	58	—					09.2025

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S&P Target Date 2055 TR USD		6.91%	16.50%	14.47%	20.61%	12.63%	11.06%	7.48%	06.2012				09.2025
JPMorgan SmartRetirement 2060 Fund R6 (JAKYX)		6.04%	15.56%	13.38%	20.20%	12.18%	—	10.60%	08.2016	0.41%	0.46%	—	09.2025
Category Percentile Rank	Target Date 2060	71	71	74	53	36	—	—					09.2025
S&P Target Date 2060 TR USD		6.95%	16.42%	14.44%	20.66%	12.62%	11.14%	10.73%	05.2016				09.2025
JPMorgan SmartRetirement 2065 Fund R6 (JSMOX)		5.99%	15.49%	13.24%	—	—	—	18.50%	11.2022	0.42%	3.02%	—	09.2025
Category Percentile Rank	Target Date 2065+	75	81	82	—	—	—	—					09.2025
S&P Target Date 2065+ TR USD		7.07%	16.65%	14.80%	20.88%	12.80%	—	11.19%	06.2021				09.2025
JPMorgan SmartRetirement Income Fund R6 (JSIYX)		4.04%	10.54%	8.24%	11.85%	5.58%	5.74%	5.08%	11.2014	0.34%	0.38%	—	09.2025
Category Percentile Rank	Target Date Retirement	9	8	6	5	8	24	—					09.2025
S&P Target Date Retirement Income TR USD		3.63%	9.82%	7.53%	10.50%	4.81%	5.26%	4.68%	09.2008				09.2025
JPMorgan Investor Balanced Fund R6 (JFQUX)		4.53%	11.09%	9.69%	13.98%	8.12%	7.95%	7.60%	07.2017	0.46%	0.46%	—	09.2025
Category Percentile Rank	Target Risk Moderate	61	55	60	59	54	—	—					09.2025
S&P Target Risk Balanced TR USD		5.40%	13.80%	11.70%	15.86%	8.40%	8.17%	6.18%	01.2007				09.2025
<b>Supplemental-Other</b>													
JPMorgan Emerging Markets Equity Fund R6 (JEMWX)		13.52%	33.44%	25.06%	18.18%	3.88%	9.28%	6.36%	12.2013	0.74%	0.81%	—	09.2025
Category Percentile Rank	Emerging Mkts Growth	7	5	5	28	53	26	—					09.2025

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MSCI EM NR USD		10.64%	27.53%	17.32%	18.21%	7.02%	7.99%	8.37%	01.2001				09.2025
American Funds American High-Income Trust R6 (RITGX)		2.72%	7.18%	7.58%	11.26%	7.08%	6.56%	7.94%	05.2009	0.32%	0.32%	—	09.2025
Category Percentile Rank	High Yield	17	24	17	12	5	4	—					09.2025
IA Bloomberg US HY Corporate Bonds		2.54%	7.22%	7.41%	11.09%	5.55%	6.17%	6.76%	01.1926				09.2025
American Funds Inflation Linked Bond Fund R6 (RILFX)		1.98%	7.10%	4.01%	4.41%	0.89%	3.03%	2.75%	11.2013	0.29%	0.29%	—	09.2025
Category Percentile Rank	Inflation-Linked Bond	41	15	46	69	72	26	—					09.2025
Bloomberg Gbl Infl Linked US TIPS TR USD		2.10%	6.87%	3.79%	4.88%	1.42%	3.01%	4.77%	10.1997				09.2025
JPMorgan Mid Cap Growth Fund R6 (JMGMX)		4.52%	12.12%	17.67%	18.88%	9.13%	13.10%	14.07%	11.2011	0.65%	0.69%	—	09.2025
Category Percentile Rank	Mid Growth	37	31	34	37	34	17	—					09.2025
Russell Mid Cap Growth TR USD		2.78%	12.84%	22.02%	22.85%	11.26%	13.37%	11.32%	02.1995				09.2025
JPMorgan Mid Cap Value Fund R6 (JMVYX)		3.46%	4.19%	3.82%	13.56%	13.66%	9.20%	8.87%	09.2016	0.60%	0.69%	—	09.2025
Category Percentile Rank	Mid Value	77	81	67	71	60	—	—					09.2025
Russell Mid Cap Value TR USD		6.18%	9.50%	7.58%	15.51%	13.66%	9.96%	11.32%	02.1995				09.2025
DFA Real Estate Securities Portfolio Institutional (DFREX)		2.11%	3.89%	-4.37%	8.20%	7.05%	6.51%	9.02%	01.1993	0.18%	0.20%	—	09.2025
Category Percentile Rank	Specialty - Real Estate	53	40	64	56	53	29	—					09.2025
FTSE NAREIT Equity REITs TR USD		4.77%	4.51%	-1.98%	10.80%	9.33%	6.61%	10.90%	12.1971				09.2025

Source: Morningstar for fund returns and expense data; MPI Stylus for index data.

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# Appendices

# Report definitions

**Alpha:** The measure of returns of a fund that cannot be attributed to the performance of the market. In other words, it shows how the manager performed if the market's return was zero. The higher the number the more return added by the manager. A negative number indicates the manager did not contribute any performance above the performance of the market.

**Peer Group:** Mesirow's grouping of funds based on a proprietary process utilizing returns based style analysis that distinguishes Style Pure from Multi-Style Managers.

**PrecisionAlpha®:** Mesirow's proprietary measure of alpha. The process differs from traditional alpha measures by 1) more accurately grouping similar strategies (style pure and multi style managers), 2) increasing the likelihood that multi-style managers are included in the analysis, and 3) accounting for statistical confidence to better differentiate skill from luck.

**PrecisionAlpha® Return Score:** Based on the rank of each fund's PrecisionAlpha® within its Peer Group; funds with higher PrecisionAlpha® Return Scores and higher PrecisionAlpha® are desirable.

**Information Ratio:** Calculated by taking the PrecisionAlpha® and dividing it by the tracking error, it gives the sense of how much excess return a fund provides for each unit of risk.

**PrecisionAlpha® Risk Score:** Based on the reverse rank of each fund's Information Ratio within its Peer Group; funds with higher Information Ratios and consequently lower PrecisionAlpha® Risk scores are desirable.

**Mesirow asset class:** An investment option's asset class assigned by Mesirow. An investment option may fall under a Core Asset Class, a Supplemental Asset Class, or an Excluded Asset Class. An investment option that lands in an asset class not eligible for coverage is considered Excluded.

**Category:** Category based on various analyses including style, holdings and portfolio characteristics.

**Category Percentile Rank:** A fund's total-return percentile rank relative to all funds that have the same Category. The highest (or most favorable) percentile rank is 1 and the lowest (or least favorable) percentile rank is 100. The top-performing fund in a category will always receive a rank of 1.

**Quartile Rankings:** Based on the Precision Return and Risk Scores or Category Rank, where first quartile = 1% – 25%; second quartile = 26% – 50%; third quartile = 51% – 75%; and fourth quartile = 76% – 100%.

# Benchmark descriptions

**Bloomberg Gbl Infl Linked US TIPS TR USD:** Measures the performance of the US Treasury Inflation Protected Securities (TIPS) market. Federal Reserve holdings of US TIPS are not index eligible and are excluded from the face amount outstanding of each bond in the index.

**Bloomberg US Agg Bond TR USD:** Measures the performance of the investment grade, US dollar-denominated, fixed-rate taxable bond market. The index includes US Treasuries, government-related and corporate securities, fixed-rate agency MBS, ABS and CMBS (agency and non-agency).

**Bloomberg US MBS TR USD:** Measures the performance of fixed-rate agency mortgage backed pass-through securities guaranteed by Ginnie Mae, Fannie Mae, and Freddie Mac.

**FTSE NAREIT Equity REITs TR USD:** A free-float adjusted, capitalization-weighted index that comprises all Equity REITs not designated as Timber REITs or Infrastructure REITs.

**FTSE Treasury Bill 3 Mon USD:** Measures the daily performance of 3-month US Treasury bills.

**IA Bloomberg US HY Corporate Bonds:** Measures the performance of US dollar-denominated, high yield, fixed-rate corporate bonds. Securities are classified as high yield if the middle rating of Moody's Investor Service, Inc., Fitch Ratings, Inc. and S&P Global Ratings is Ba1/BB+/BB+ or below. Bonds from issuers with an emerging markets country of risk, based on Bloomberg EM country definition, are excluded.

**MSCI EAFE NR USD:** Captures large and mid cap representation across 21 developed markets countries, excluding the US and Canada. With around 700 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.

**MSCI EM NR USD:** Captures large and mid cap representation across 24 emerging markets countries. With around 1,200 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.

**Russell 1000 Growth TR USD:** Measures the performance of the large cap growth segment of the US equity universe. It includes those Russell 1000 companies with higher price-to-book ratios and higher forecasted growth values.

**Russell 1000 TR USD:** Measures the performance of the large cap segment of the US equity universe. It is a subset of the Russell 3000 Index and includes approximately 1,000 of the largest securities from the Russell 3000 Index based on a combination of their market cap and current index membership.

**Russell 1000 Value TR USD:** Measures the performance of the large cap value segment of the US equity universe. It includes those Russell 1000 companies with lower price-to-book ratios and lower forecasted growth values.

**Russell 2000 TR USD:** Measures the performance of the small cap segment of the US equity universe. It is a subset of the Russell 3000 Index and includes approximately 2,000 of the smallest securities from the Russell 3000 Index based on a combination of their market cap and current index membership.

**Russell Mid Cap Growth TR USD:** Measures the performance of the mid cap growth segment of the US equity universe. It includes those Russell Mid Cap Index companies with higher price-to-book ratios and higher forecasted growth values.

**Russell Mid Cap Value TR USD:** Measures the performance of the mid cap value segment of the US equity universe. It includes those Russell Mid Cap Index companies with lower price-to-book ratios and lower forecasted growth values.

**S&P Target Date 2025 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2030 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

## Benchmark descriptions

**S&P Target Date 2035 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2040 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2045 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2050 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2055 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2060 TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date 2065+ TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Date Retirement Income TR USD:** Part of the S&P Target Date® Series. This series includes thirteen multi-asset class indices, each corresponding to a particular target retirement date. The asset allocation for each index in the series is determined once a year through survey of large fund management companies that offer target date products.

**S&P Target Risk Balanced TR USD:** Part of the S&P Target Risk Series. This series includes four multi-asset class indices, with each index corresponding to a particular risk level. This index measures the performance of balanced stock-bond allocations to equities, targeting a 60%/40% equity-fixed income split.



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\*Neither principal nor the underlying assets of target date investments are guaranteed at any time, including the target date, and investment risk remains at all time. There is no assurance that the recommended asset allocation will either maximize returns or minimize risk or be the appropriate allocation in all circumstances for every investor with a particular time horizon.

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