

Sample UBS Investment Monitoring Report

Fund Criteria

SAMPLE REPORT
NOT FOR DISTRIBUTION TO THE PUBLIC

ACTIVE

INVESTMENT	MGR	5 YR R-SQ PEER	5 YR STYLE	3 YR PEER	5 YR PEER	5 YR ALPHA PEER	5 YR SHRP PEER	5 YR INFO PEER	5 YR BETA PEER	3 YR TRACK ERR PEER	NET EXP	M STAR	SCORE OF 12
Intermediate-Term Bond													
Oppenheimer Total Return Bond R - OPBNX	8.76	91.22	13.54	2.18	2.46	0.37	0.75	0.41	0.99	0.81	1.10	2.00	8
Bloomberg Barclays U.S. Aggregate Bond	-	100.00	1.51	2.24	2.10	0.00	0.65	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	8.51	90.58	17.80	2.21	2.05	0.07	0.64	-0.04	0.96	0.98	0.70	3.00	-
World Bond													
AB Global Bond R - ANARX	25.78	18.41	28.82	2.48	2.29	2.09	0.70	0.40	0.18	7.05	1.25	4.00	9
Citi WGBI NonUSD USD	-	100.00	57.22	1.99	-0.29	0.00	-0.04	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	7.13	57.20	45.94	2.02	1.11	1.11	0.20	0.29	0.53	5.38	0.89	3.00	-
Inflation-Protected Bond													
R American Century Short Dur Inf PrBd A - APOAX	12.59	69.29	10.73	0.89	-0.37	-0.60	-0.32	-0.16	0.36	2.29	0.82	2.00	4
P Eaton Vance Short Dur Infl-Prot Inc A - EARRX	7.76	39.78	8.02	2.13	0.83	0.59	0.29	0.20	0.28	2.83	0.75	5.00	9
Bloomberg Barclays U.S. TIPS	-	100.00	0.00	2.05	0.13	0.00	-0.01	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	7.01	96.36	6.65	1.57	-0.27	-0.37	-0.10	-0.38	0.96	0.94	0.60	3.00	-
Allocation--50% to 70% Equity													
Janus Henderson Balanced R - JDBRX	12.68	91.87	17.14	6.96	9.45	-1.12	1.44	-0.45	1.04	2.04	1.34	4.00	10
60% S&P500 / 40% BBCap Agg Bond	-	100.00	5.41	7.80	10.25	0.00	1.69	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	7.60	91.22	11.30	6.33	8.40	-2.15	1.27	-0.92	1.07	2.02	1.06	3.00	-
Large Growth													
Franklin Growth R - FGSRX	9.09	95.54	16.25	11.63	15.52	0.18	1.62	-0.81	0.89	2.39	1.13	4.00	9
Russell 1000 Growth Index	-	100.00	3.10	13.79	17.33	0.00	1.64	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	8.67	88.92	25.39	11.33	15.60	-1.65	1.39	-0.53	1.01	3.68	1.00	3.00	-

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Score Legend:

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Mid-Cap Value													
Victory Sycamore Established Value R - GETGX	19.43	90.97	20.22	11.79	15.94	1.61	1.44	0.39	0.96	3.62	1.13	5.00	10
Russell Mid-Cap Value Index	-	100.00	0.00	9.00	14.68	0.00	1.35	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	8.42	91.38	23.78	8.42	13.61	-1.25	1.18	-0.34	1.01	3.76	1.08	3.00	-
Mid-Cap Growth													
Prudential Jennison Mid-Cap Growth R - JDERX	12.34	94.32	30.85	7.08	11.25	-2.69	1.06	-1.57	0.93	2.92	1.24	3.00	5
Russell Mid-Cap Growth Index	-	100.00	0.00	10.30	15.30	0.00	1.35	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	9.51	89.84	24.48	9.66	13.63	-1.35	1.15	-0.43	1.00	4.02	1.12	3.00	-
Small Value													
Victory Sycamore Small Company Opp R - GOGFX	19.60	95.22	14.49	12.55	14.95	2.74	1.12	0.63	0.91	3.37	1.48	5.00	11
Russell 2000 Value Index	-	100.00	0.00	9.55	13.01	0.00	0.93	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	8.93	93.25	21.32	8.76	12.93	0.60	0.94	-0.03	0.94	3.70	1.22	3.00	-
Small Growth													
Buffalo Small Cap - BUFSX	19.73	89.48	16.41	8.85	11.68	-1.76	0.85	-0.75	0.90	4.61	1.02	3.00	5
Russell 2000 Growth Index	-	100.00	0.00	10.28	15.21	0.00	1.03	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	8.67	90.51	20.22	9.98	14.05	0.53	1.02	-0.26	0.90	4.83	1.19	3.00	-
Small Growth - CIT													
W BlackRock Russell 2000 Growth F - F00000Q6H9	17.75	99.96	1.08	10.26	15.35	0.15	1.04	0.52	1.00	0.33	0.02	3.00	8
Russell 2000 Growth Index	-	100.00	0.00	10.28	15.21	0.00	1.03	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	9.51	95.37	18.36	10.26	15.10	0.33	1.05	-0.06	0.95	3.65	0.65	3.50	-

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Foreign Large Growth													
Oppenheimer International Growth R - OIGNX	21.78	87.55	19.90	8.20	7.90	0.24	0.70	-0.02	0.97	3.84	1.38	4.00	4
MSCI AC World Index ex USA Growth ND USD	-	100.00	20.25	9.29	7.97	0.00	0.73	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	8.25	87.55	23.83	9.11	8.13	0.61	0.74	0.05	0.94	4.00	1.14	3.00	-
World Large Stock													
Putnam Global Equity A - PEQUX	6.35	89.74	21.60	8.27	11.14	-0.42	1.04	-0.15	1.00	3.26	1.17	3.00	8
MSCI The World Index ND USD	-	100.00	24.07	9.26	11.64	0.00	1.14	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	5.62	88.21	26.70	8.66	10.92	-0.29	1.04	-0.23	0.98	3.74	1.13	3.00	-
Diversified Emerging Mkts													
Oppenheimer Developing Markets R - ODVNX	10.68	88.09	20.86	7.12	4.73	0.80	0.39	0.08	0.90	4.94	1.57	4.00	9
MSCI EM (Emerging Markets) ND USD	-	100.00	10.07	9.10	4.35	0.00	0.35	-	1.00	0.00	-	-	-
Peer Group Median (50th Percentile)	5.18	89.71	16.79	8.62	4.32	0.35	0.36	-0.01	0.90	4.98	1.35	3.00	-

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Large Blend													
Principal Large Cap S&P 500 Index R3 - PLFMX	6.84	99.68	99.60	4.56	10.61	14.94	0.99	0.98	0.23	0.58	0.73	3.00	12
S&P 500 TR USD	-	-	-	-	11.41	15.79	-	-	-	-	-	-	-
Peer Group Median (50th Percentile)	7.53	94.44	94.55	18.98	10.03	14.66	0.99	0.99	2.05	2.48	0.92	3.00	-

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INVESTMENT	3 YR	5 YR	NET EXP	SCORE OF 12
American Century One Choice 2020 R	4.48	6.29	1.27	3
Rank	79	65	87	-
Dow Jones US 2020 Target Index	4.95	7.22	-	-
Peer Group Median (50th Percentile)	5.84	7.19	0.73	-
American Century One Choice 2025 R	4.97	6.89	1.29	2
Rank	93	80	89	-
Dow Jones US 2025 Target Index	6.07	8.84	-	-
Peer Group Median (50th Percentile)	6.68	8.21	0.73	-
American Century One Choice 2030 R	5.48	7.62	1.31	2
Rank	92	81	89	-
Dow Jones US 2030 Target Index	7.08	10.38	-	-
Peer Group Median (50th Percentile)	7.32	9.02	0.78	-
American Century One Choice 2035 R	5.94	8.36	1.34	1
Rank	97	93	90	-
Dow Jones US 2035 Target Index	8.02	11.76	-	-
Peer Group Median (50th Percentile)	8.04	9.93	0.75	-
American Century One Choice 2040 R	6.42	9.06	1.36	1
Rank	93	83	89	-
Dow Jones US 2040 Target Index	8.80	12.84	-	-
Peer Group Median (50th Percentile)	8.25	10.29	0.80	-
American Century One Choice 2045 R	6.94	9.72	1.40	1
Rank	95	86	91	-
Dow Jones US 2045 Target Index	9.34	13.51	-	-
Peer Group Median (50th Percentile)	8.68	10.68	0.75	-
American Century One Choice 2050 R	7.27	10.04	1.42	2
Rank	92	79	90	-
Dow Jones US 2050 Target Index	9.60	13.72	-	-
Peer Group Median (50th Percentile)	8.60	10.78	0.80	-

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INVESTMENT	3 YR	5 YR	NET EXP	SCORE OF 12
American Century One Choice 2055 R	7.49	10.33	1.42	1
Rank	96	80	91	-
Dow Jones US 2055 Target Index	9.61	13.72	-	-
Peer Group Median (50th Percentile)	8.81	10.91	0.75	-

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