

**Insperty 401(k) Plan**  
Investment Performance Summary



AS OF DECEMBER 31, 2020	Ticker	Investment Category <sup>1</sup>	3 Months	YTD	1 Year	3 Year	5 Year	10 Year	Since Inception <sup>2</sup>	Gross Expense Ratio <sup>3</sup>
<b>Fixed-Income Funds</b>										
<b>NY Life Anchor Stable Value Fund</b>	-	<b>Stable Value</b>	<b>0.51</b>	<b>2.25</b>	<b>2.25</b>	<b>2.33</b>	<b>2.13</b>	<b>2.10</b>	<b>3.89</b>	<b>0.35</b>
<i>FTSE 3-Month T-Bill Index</i>			0.02	0.58	0.58	1.56	1.16	0.60		
<b>Metropolitan West Total Return Bond Fund</b>	-	<b>Intermediate-Term Bond</b>	<b>1.22</b>	<b>9.28</b>	<b>9.28</b>	<b>6.13</b>	<b>4.83</b>	<b>N/A</b>	<b>3.93</b>	<b>0.30</b>
<i>BB U.S. Aggregate Bond Index</i>			0.67	7.51	7.51	5.34	4.44	3.84		
<i>Category Average</i>			1.07	7.90	7.90	5.25	4.43	N/A		
<b>SSGA U.S. Bond Index Fund</b>	-	<b>Intermediate-Term Bond</b>	<b>0.68</b>	<b>7.65</b>	<b>7.65</b>	<b>5.38</b>	<b>4.44</b>	<b>3.82</b>	<b>4.28</b>	<b>0.03</b>
<i>BB U.S. Aggregate Bond Index</i>			0.67	7.51	7.51	5.34	4.44	3.84		
<b>PIMCO Income Fund<sup>4</sup></b>	<b>PIMIX</b>	<b>Multisector Bond</b>	<b>4.46</b>	<b>5.80</b>	<b>5.80</b>	<b>4.76</b>	<b>6.30</b>	<b>7.36</b>	<b>8.03</b>	<b>0.50</b>
<i>BB U.S. Aggregate Bond Index</i>			0.67	7.51	7.51	5.34	4.44	3.84		
<i>Category Average</i>			4.46	5.80	2.80	4.82	5.56	4.83		
<b>Multi-Asset Funds</b>										
<b>PIMCO All Asset<sup>5</sup></b>	<b>PAAIX</b>	<b>Multi-Asset</b>	<b>12.15</b>	<b>8.41</b>	<b>8.41</b>	<b>4.95</b>	<b>8.35</b>	<b>5.05</b>	<b>6.88</b>	<b>0.87</b>
<i>BBgBarc U.S. TIPS 1-10 Year Index</i>			1.60	8.39	8.39	4.93	4.13	2.88		
<b>Stock Funds</b>										
<b>T. Rowe Price Blue Chip Growth Fund</b>	-	<b>Large-Cap Growth</b>	<b>8.13</b>	<b>34.71</b>	<b>34.71</b>	<b>21.55</b>	<b>19.98</b>	<b>17.95</b>	<b>18.17</b>	<b>0.40</b>
<i>Russell 1000 Growth Index</i>			11.39	38.49	38.49	22.99	21.00	17.21		
<i>Category Average</i>			11.99	33.55	33.55	20.55	18.16	15.28		
<b>SSGA S&amp;P 500 Index Fund</b>	-	<b>Large-Cap Blend</b>	<b>12.13</b>	<b>18.35</b>	<b>18.35</b>	<b>14.15</b>	<b>15.19</b>	<b>13.87</b>	<b>7.47</b>	<b>0.01</b>
<i>S&amp;P 500 Index</i>			12.15	18.40	18.40	14.18	15.22	13.88		
<b>Dodge &amp; Cox Stock Fund</b>	<b>DODGX</b>	<b>Large-Cap Value</b>	<b>20.86</b>	<b>7.16</b>	<b>7.16</b>	<b>7.52</b>	<b>12.27</b>	<b>11.96</b>	<b>11.00</b>	<b>0.52</b>
<i>Russell 1000 Value Index</i>			16.25	2.80	2.80	6.07	9.74	10.50		
<i>Category Average</i>			15.70	2.57	2.57	5.63	9.33	9.84		
<b>T. Rowe Price Mid-Cap Growth Fund</b>	<b>RPTIX</b>	<b>Mid-Cap Growth</b>	<b>16.91</b>	<b>24.32</b>	<b>24.32</b>	<b>17.10</b>	<b>16.40</b>	<b>N/A</b>	<b>15.45</b>	<b>0.61</b>
<i>Russell Midcap Growth Index</i>			19.02	35.59	35.59	20.50	18.66	15.04		
<i>Category Average</i>			19.91	33.51	33.51	19.34	17.70	N/A		
<b>Victory Sycamore Mid-Cap Value Fund</b>	<b>VEVRX</b>	<b>Mid-Cap Value</b>	<b>20.61</b>	<b>8.16</b>	<b>8.16</b>	<b>7.86</b>	<b>12.02</b>	<b>N/A</b>	<b>10.50</b>	<b>0.58</b>
<i>Russell Midcap Value Index</i>			20.43	4.96	4.96	5.37	9.73	10.49		
<i>Category Average</i>			22.12	3.64	3.64	4.28	8.91	N/A		
<b>SSGA Russell SMID Cap Index Fund</b>	-	<b>Small-Cap Blend</b>	<b>27.31</b>	<b>32.64</b>	<b>32.64</b>	<b>15.51</b>	<b>16.24</b>	<b>13.21</b>	<b>11.21</b>	<b>0.04</b>
<i>Russell Small Cap Completeness Index</i>			27.29	32.88	32.88	15.60	16.33	13.25		
<b>Hartford SmallCap Growth HLS Fund</b>	<b>HISGX</b>	<b>Small-Cap Growth</b>	<b>31.78</b>	<b>33.20</b>	<b>33.20</b>	<b>16.90</b>	<b>16.60</b>	<b>14.62</b>	<b>10.80</b>	<b>0.66</b>
<i>Russell 2000 Growth Index</i>			29.61	34.63	34.63	16.20	16.36	13.48		
<i>Category Average</i>			26.97	37.51	37.51	18.66	17.65	14.18		
<b>Nuveen Small Cap Value Fund</b>	<b>FSCWX</b>	<b>Small-Cap Value</b>	<b>32.02</b>	<b>-4.00</b>	<b>-4.00</b>	<b>-3.55</b>	<b>N/A</b>	<b>N/A</b>	<b>3.60</b>	<b>0.83</b>
<i>Russell 2000 Value Index</i>			33.36	4.63	4.63	3.72	9.65	8.66		
<i>Category Average</i>			31.09	3.43	3.43	2.01	N/A	N/A		
<b>American Funds EuroPacific Growth Fund</b>	<b>RERGX</b>	<b>Foreign Large Growth</b>	<b>19.95</b>	<b>25.27</b>	<b>25.27</b>	<b>10.74</b>	<b>12.47</b>	<b>8.14</b>	<b>10.69</b>	<b>0.46</b>
<i>MSCI ACWI Ex. US Index</i>			17.01	10.65	10.65	4.88	8.93	4.92		
<i>Category Average</i>			17.20	12.96	12.96	5.34	8.65	5.67		
<b>SSGA Global All Cap ex-U.S. Index Fund</b>	-	<b>International All-Cap</b>	<b>16.93</b>	<b>11.27</b>	<b>11.27</b>	<b>5.02</b>	<b>9.31</b>	<b>N/A</b>	<b>5.03</b>	<b>0.07</b>
<i>MSCI ACWI Ex. US IMI Index</i>			17.22	11.12	11.12	4.83	8.98	5.06		

<sup>1</sup> The Investment Category for each fund represents a group of funds, determined by Morningstar®, that share similar portfolio characteristics and investment styles. The category averages shown were calculated by Morningstar® and can be used by investors to compare the performance of their fund to the category as a whole.

<sup>2</sup> Since inception reflects since inception performance for the particular share class.

<sup>3</sup> The gross expense ratio represents the percentage of fund assets used to pay for operating expenses and management fees, including 12b-1 fees, administrative fees, and all other asset-based costs incurred by the fund, except brokerage costs. Fund expenses are reflected in the fund's NAV and performance shown is net of expenses.

<sup>4</sup> Total expense ratio would be 1.09% which includes 0.59% of interest expense which is not payable to the manager.

<sup>5</sup> Total expense ratio would be 1.185% which includes 0.32% of interest expense which is not payable to the manager.

All performance statistics are calculated using net of fees return data, unless otherwise noted. Performance is annualized for periods greater than one year. Performance includes reinvestment of dividends and other income. Sources: FactSet, Managers.

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<b>Target-Date Funds</b>										
<b>State Street Target Retirement Income Fund</b>	-	<b>Retirement Income</b>	<b>5.97</b>	<b>9.77</b>	<b>9.77</b>	<b>6.36</b>	<b>6.67</b>	<b>5.51</b>	<b>6.45</b>	<b>0.06</b>
<i>State Street Income Fund Custom Blended Index</i>										
<i>S&amp;P Target-Date 2010 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2020 Fund</b>	-	<b>Target-Date 2020</b>	<b>7.65</b>	<b>11.20</b>	<b>11.20</b>	<b>7.49</b>	<b>8.63</b>	<b>7.99</b>	<b>9.57</b>	<b>0.06</b>
<i>State Street Target Retirement 2020 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2020 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2025 Fund</b>	-	<b>Target-Date 2025</b>	<b>9.65</b>	<b>15.11</b>	<b>15.11</b>	<b>9.11</b>	<b>10.36</b>	<b>9.08</b>	<b>9.70</b>	<b>0.06</b>
<i>State Street Target Retirement 2025 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2025 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2030 Fund</b>	-	<b>Target-Date 2030</b>	<b>11.11</b>	<b>17.58</b>	<b>17.58</b>	<b>10.16</b>	<b>11.35</b>	<b>9.69</b>	<b>11.45</b>	<b>0.06</b>
<i>State Street Target Retirement 2030 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2030 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2035 Fund</b>	-	<b>Target-Date 2035</b>	<b>12.25</b>	<b>18.47</b>	<b>18.47</b>	<b>10.59</b>	<b>11.92</b>	<b>9.93</b>	<b>10.62</b>	<b>0.06</b>
<i>State Street Target Retirement 2035 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2035 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2040 Fund</b>	-	<b>Target-Date 2040</b>	<b>13.30</b>	<b>19.04</b>	<b>19.04</b>	<b>10.83</b>	<b>12.35</b>	<b>10.14</b>	<b>12.01</b>	<b>0.06</b>
<i>State Street Target Retirement 2040 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2040 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2045 Fund</b>	-	<b>Target-Date 2045</b>	<b>14.30</b>	<b>19.52</b>	<b>19.52</b>	<b>11.03</b>	<b>12.70</b>	<b>10.30</b>	<b>10.97</b>	<b>0.06</b>
<i>State Street Target Retirement 2045 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2045 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2050 Fund</b>	-	<b>Target-Date 2050</b>	<b>14.90</b>	<b>19.92</b>	<b>19.92</b>	<b>11.12</b>	<b>12.76</b>	<b>10.33</b>	<b>11.34</b>	<b>0.06</b>
<i>State Street Target Retirement 2050 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2050 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2055 Fund</b>	-	<b>Target-Date 2055</b>	<b>14.88</b>	<b>19.90</b>	<b>19.90</b>	<b>11.11</b>	<b>12.75</b>	<b>N/A</b>	<b>9.76</b>	<b>0.06</b>
<i>State Street Target Retirement 2055 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2055 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2060 Fund</b>	-	<b>Target-Date 2060</b>	<b>14.89</b>	<b>19.91</b>	<b>19.91</b>	<b>11.10</b>	<b>12.75</b>	<b>N/A</b>	<b>9.83</b>	<b>0.06</b>
<i>State Street Target Retirement 2060 Custom Blended Index</i>										
<i>S&amp;P Target-Date 2060 Index</i>										
<i>Category Average</i>										
<b>State Street Target Retirement 2065 Fund</b>	-	<b>Target-Date 2065</b>	<b>14.89</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>47.28</b>	<b>0.06</b>
<i>State Street Target Retirement 2065 Custom Blended Index</i>										
<i>Category Average</i>										

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