

# Sample UBS Investment Monitoring Report

## Calendar Year Performance

SAMPLE REPORT  
NOT FOR DISTRIBUTION TO THE PUBLIC

	Ticker	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>Fixed Income</b>												
<b>Intermediate-Term Bond</b>												
Oppenheimer Total Return Bond R	OPBNX	4.11	-35.92	7.02	10.51	7.18	9.61	-0.60	6.49	0.20	2.43	3.95
<b>BB Aggregate Bond</b>		<b>6.97</b>	<b>5.24</b>	<b>5.93</b>	<b>6.54</b>	<b>7.84</b>	<b>4.22</b>	<b>-2.02</b>	<b>5.97</b>	<b>0.55</b>	<b>2.65</b>	<b>3.54</b>
<i>Intermediate-Term Bond Median</i>		5.68	-2.67	13.18	7.67	6.47	6.88	-1.56	5.54	-0.01	3.03	3.81
<b>World Bond</b>												
AB Global Bond R	ANARX	9.63	-10.85	23.65	9.29	4.12	6.62	-2.48	6.68	-0.02	5.07	2.45
<b>Citi WGBI NonUSD USD</b>		<b>11.45</b>	<b>10.11</b>	<b>4.39</b>	<b>5.21</b>	<b>5.17</b>	<b>1.51</b>	<b>-4.56</b>	<b>-2.68</b>	<b>-5.54</b>	<b>1.81</b>	<b>10.33</b>
<i>World Bond Median</i>		8.50	-1.08	13.84	7.30	3.73	7.75	-2.63	1.59	-4.23	3.40	7.01
<b>Inflation-Protected Bond</b>												
American Century Short Dur Inf PrBd A	APOAX	10.92	-1.54	11.09	5.23	8.65	3.10	-2.60	-1.83	-0.81	3.02	0.48
Eaton Vance Short Dur Infl-Prot Inc A	EARRX					4.19	3.91	-0.17	-2.00	-1.10	5.80	1.80
<b>BB TIPS</b>		<b>11.64</b>	<b>-2.35</b>	<b>11.41</b>	<b>6.31</b>	<b>13.56</b>	<b>6.98</b>	<b>-8.60</b>	<b>3.64</b>	<b>-1.44</b>	<b>4.68</b>	<b>3.01</b>
<i>Inflation-Protected Bond Median</i>		10.86	-2.05	10.33	5.83	12.04	6.49	-8.62	2.51	-2.03	4.39	2.62



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<b>Balanced</b>												
<b>Allocation--50% to 70% Equity</b>												
Janus Henderson Balanced R	JDBRX	9.61	-15.64	23.62	7.24	0.80	12.40	19.02	7.81	0.00	3.89	17.80
<b>60% S&amp;P500 / 40% BBcap Agg Bond</b>		<b>6.22</b>	<b>-22.06</b>	<b>18.40</b>	<b>12.13</b>	<b>4.69</b>	<b>11.31</b>	<b>17.56</b>	<b>10.62</b>	<b>1.28</b>	<b>8.31</b>	<b>14.21</b>
<i>Allocation--50% to 70% Equity Median</i>		6.33	-27.48	24.34	12.19	0.22	12.20	17.18	6.28	-1.32	6.93	13.84
<b>Target-Date 2020</b>												
American Century One Choice 2020 R	ARBRX			19.38	11.26	1.99	10.81	12.03	6.17	-2.10	5.45	10.47
<b>DJ US 2020 Target Index</b>		<b>5.07</b>	<b>-20.31</b>	<b>19.99</b>	<b>13.44</b>	<b>4.62</b>	<b>10.24</b>	<b>13.52</b>	<b>8.00</b>	<b>0.27</b>	<b>6.28</b>	<b>8.46</b>
<i>Target-Date 2020 Median</i>		5.59	-30.17	26.61	12.54	0.03	11.88	13.22	5.17	-1.17	6.37	12.72
<b>Target-Date 2025</b>												
American Century One Choice 2025 R	ARWRX	8.74	-25.39	20.63	12.01	1.26	11.57	13.47	6.33	-2.01	5.68	11.71
<b>DJ US 2025 Target Index</b>		<b>4.74</b>	<b>-25.30</b>	<b>23.85</b>	<b>15.44</b>	<b>3.53</b>	<b>11.71</b>	<b>17.76</b>	<b>8.69</b>	<b>0.19</b>	<b>7.77</b>	<b>10.53</b>
<i>Target-Date 2025 Median</i>		8.13	-33.69	28.94	13.53	-2.00	13.24	16.77	5.42	-1.25	6.95	15.03
<b>Target-Date 2030</b>												
American Century One Choice 2030 R	ARCRX			22.44	12.82	0.44	12.23	15.39	6.60	-1.87	5.89	12.95
<b>DJ US 2030 Target Index</b>		<b>4.43</b>	<b>-29.54</b>	<b>27.31</b>	<b>17.22</b>	<b>2.44</b>	<b>13.12</b>	<b>22.04</b>	<b>9.35</b>	<b>-0.15</b>	<b>9.12</b>	<b>12.67</b>
<i>Target-Date 2030 Median</i>		6.36	-35.63	29.95	13.65	-2.32	13.95	18.74	5.56	-1.31	7.32	17.01
<b>Target-Date 2035</b>												
American Century One Choice 2035 R	ARYRX	9.71	-30.92	23.69	13.80	-0.21	13.05	17.41	7.02	-1.79	6.08	14.13
<b>DJ US 2035 Target Index</b>		<b>4.18</b>	<b>-32.57</b>	<b>29.98</b>	<b>18.62</b>	<b>1.50</b>	<b>14.31</b>	<b>25.86</b>	<b>9.92</b>	<b>-0.45</b>	<b>10.36</b>	<b>14.72</b>
<i>Target-Date 2035 Median</i>		9.08	-36.04	31.26	14.55	-3.35	15.05	21.70	5.61	-1.46	7.82	18.72
<b>Target-Date 2040</b>												
American Century One Choice 2040 R	ARDRX			25.18	14.55	-0.77	13.93	19.00	7.57	-1.90	6.36	15.49
<b>DJ US 2040 Target Index</b>		<b>4.04</b>	<b>-34.17</b>	<b>31.59</b>	<b>19.52</b>	<b>0.84</b>	<b>15.15</b>	<b>28.75</b>	<b>10.35</b>	<b>-0.70</b>	<b>11.37</b>	<b>16.45</b>
<i>Target-Date 2040 Median</i>		6.63	-37.29	31.64	14.66	-3.68	15.08	22.40	5.80	-1.50	7.97	19.86
<b>Target-Date 2045</b>												
American Century One Choice 2045 R	ARORX	10.26	-34.02	25.73	14.92	-1.27	14.42	20.47	7.92	-1.94	6.68	16.91
<b>DJ US 2045 Target Index</b>		<b>4.02</b>	<b>-34.40</b>	<b>31.97</b>	<b>19.83</b>	<b>0.56</b>	<b>15.53</b>	<b>30.31</b>	<b>10.61</b>	<b>-0.87</b>	<b>12.06</b>	<b>17.68</b>
<i>Target-Date 2045 Median</i>		8.97	-37.68	31.19	15.12	-4.00	15.58	23.38	5.76	-1.56	8.15	20.68
<b>Target-Date 2050</b>												
American Century One Choice 2050 R	ARFWX			26.03	15.24	-1.45	14.68	20.97	8.05	-2.01	6.85	17.90
<b>DJ US 2050 Target Index</b>		<b>4.02</b>	<b>-34.40</b>	<b>31.97</b>	<b>19.83</b>	<b>0.55</b>	<b>15.55</b>	<b>30.51</b>	<b>10.67</b>	<b>-0.92</b>	<b>12.36</b>	<b>18.26</b>
<i>Target-Date 2050 Median</i>		6.67	-37.73	30.94	14.90	-4.07	15.52	23.34	5.88	-1.43	8.19	20.86
<b>Target-Date 2055</b>												
American Century One Choice 2055 R	AREOX						14.93	21.59	8.25	-2.05	7.06	18.44
<b>DJ US 2055 Target Index</b>		<b>4.02</b>	<b>-34.40</b>	<b>31.97</b>	<b>19.83</b>	<b>0.55</b>	<b>15.55</b>	<b>30.51</b>	<b>10.67</b>	<b>-0.92</b>	<b>12.37</b>	<b>18.30</b>



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<i>Target-Date 2055 Median</i>		6.61	-39.08	29.26	15.03	-4.38	15.73	23.35	5.89	-1.59	8.24	21.17
<b>Equity</b>												
<b>Large Blend</b>												
Principal Large Cap S&P 500 Index R3	PLFMX	4.73	-37.39	25.52	14.24	1.34	15.10	31.40	12.82	0.67	11.11	20.96
<b>Russell 1000 Index</b>		<b>5.77</b>	<b>-37.60</b>	<b>28.43</b>	<b>16.10</b>	<b>1.50</b>	<b>16.42</b>	<b>33.11</b>	<b>13.24</b>	<b>0.92</b>	<b>12.05</b>	<b>21.69</b>
<i>Large Blend Median</i>		5.56	-37.17	27.55	14.32	0.05	15.68	32.16	11.92	-0.10	10.59	20.98
<b>Large Growth</b>												
Franklin Growth R	FGSRX	6.84	-33.52	33.88	14.59	0.38	13.39	29.08	14.58	1.68	8.15	26.50
<b>Russell 1000 Growth Index</b>		<b>11.81</b>	<b>-38.44</b>	<b>37.21</b>	<b>16.71</b>	<b>2.64</b>	<b>15.26</b>	<b>33.48</b>	<b>13.05</b>	<b>5.67</b>	<b>7.08</b>	<b>30.21</b>
<i>Large Growth Median</i>		12.76	-39.89	35.56	15.91	-1.11	15.65	34.59	10.63	4.40	3.06	28.43
<b>Mid-Cap Value</b>												
Victory Sycamore Established Value R	GETGX	7.45	-29.12	34.21	21.18	-0.03	11.91	34.16	11.75	0.48	20.44	15.44
<b>Russell Mid-Cap Value Index</b>		<b>-1.42</b>	<b>-38.44</b>	<b>34.21</b>	<b>24.75</b>	<b>-1.38</b>	<b>18.51</b>	<b>33.46</b>	<b>14.75</b>	<b>-4.78</b>	<b>20.00</b>	<b>13.34</b>
<i>Mid-Cap Value Median</i>		1.66	-36.92	36.26	22.03	-4.03	16.36	35.08	10.16	-4.62	18.09	12.66
<b>Mid-Cap Growth</b>												
Prudential Jennison Mid-Cap Growth R	JDERX	15.83	-36.33	40.33	19.73	1.92	15.69	27.40	8.94	-2.90	3.62	22.03
<b>Russell Mid-Cap Growth Index</b>		<b>11.43</b>	<b>-44.32</b>	<b>46.29</b>	<b>26.38</b>	<b>-1.65</b>	<b>15.81</b>	<b>35.74</b>	<b>11.90</b>	<b>-0.20</b>	<b>7.33</b>	<b>25.27</b>
<i>Mid-Cap Growth Median</i>		17.10	-41.68	40.53	25.80	-3.84	15.12	35.36	7.59	-0.20	5.75	24.57
<b>Small Value</b>												
Victory Sycamore Small Company Opp R	GOGFX	-3.51	-27.45	32.78	21.27	0.93	11.92	32.59	6.15	-0.91	29.33	11.25
<b>Russell 2000 Value Index</b>		<b>-9.78</b>	<b>-28.92</b>	<b>20.58</b>	<b>24.50</b>	<b>-5.50</b>	<b>18.05</b>	<b>34.52</b>	<b>4.22</b>	<b>-7.47</b>	<b>31.74</b>	<b>7.84</b>
<i>Small Value Median</i>		-4.36	-32.60	30.96	25.47	-4.05	15.89	35.99	4.31	-6.18	25.80	9.03
<b>Small Growth</b>												
Buffalo Small Cap	BUFSX	-0.33	-29.84	37.49	16.59	-4.67	19.93	44.15	-6.55	-4.46	6.22	27.07
<b>Russell 2000 Growth Index</b>		<b>7.05</b>	<b>-38.54</b>	<b>34.47</b>	<b>29.09</b>	<b>-2.91</b>	<b>14.59</b>	<b>43.30</b>	<b>5.60</b>	<b>-1.38</b>	<b>11.32</b>	<b>22.17</b>
<i>Small Growth Median</i>		10.00	-40.08	35.88	27.72	-1.99	14.19	41.20	3.25	-2.13	10.52	21.87



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<b>International</b>												
<b>Foreign Large Growth</b>												
Oppenheimer International Growth R	OIGNX	12.02	-41.69	37.43	14.44	-7.96	21.29	24.79	-7.47	2.93	-2.53	26.26
<b>MSCI AC World Index ex USA Growth ND USD</b>		<b>21.03</b>	<b>-45.61</b>	<b>38.67</b>	<b>14.45</b>	<b>-14.21</b>	<b>16.67</b>	<b>15.49</b>	<b>-2.65</b>	<b>-1.25</b>	<b>0.12</b>	<b>32.01</b>
<i>Foreign Large Growth Median</i>		<i>14.55</i>	<i>-44.06</i>	<i>36.81</i>	<i>13.45</i>	<i>-12.79</i>	<i>19.41</i>	<i>20.36</i>	<i>-3.81</i>	<i>0.53</i>	<i>-1.79</i>	<i>31.16</i>
<b>World Large Stock</b>												
Putnam Global Equity A	PEQUX	8.85	-45.42	29.78	9.71	-4.85	19.84	31.65	1.46	-1.90	1.01	28.08
<b>MSCI The World Index ND USD</b>		<b>9.04</b>	<b>-40.71</b>	<b>29.99</b>	<b>11.76</b>	<b>-5.54</b>	<b>15.83</b>	<b>26.68</b>	<b>4.94</b>	<b>-0.87</b>	<b>7.51</b>	<b>22.40</b>
<i>World Large Stock Median</i>		<i>10.55</i>	<i>-40.69</i>	<i>32.30</i>	<i>12.98</i>	<i>-7.38</i>	<i>16.55</i>	<i>25.82</i>	<i>3.16</i>	<i>-0.97</i>	<i>5.21</i>	<i>23.70</i>
<b>Diversified Emerging Mkts</b>												
Oppenheimer Developing Markets R	ODVNX	33.27	-48.22	81.16	26.48	-18.42	20.46	7.95	-5.02	-14.26	6.61	34.47
<b>MSCI EM (Emerging Markets) ND USD</b>		<b>39.39</b>	<b>-53.33</b>	<b>78.51</b>	<b>18.88</b>	<b>-18.42</b>	<b>18.22</b>	<b>-2.60</b>	<b>-2.19</b>	<b>-14.92</b>	<b>11.19</b>	<b>37.28</b>
<i>Diversified Emerging Mkts Median</i>		<i>36.83</i>	<i>-53.51</i>	<i>73.97</i>	<i>18.86</i>	<i>-18.84</i>	<i>19.33</i>	<i>-1.14</i>	<i>-2.81</i>	<i>-13.60</i>	<i>8.50</i>	<i>35.98</i>

