

Further by HealthEquity Standard Investment Lineup

As of April 2025

Symbol	Fund Name	Fund Transfer Path
CGIOX	CALAMOS GROWTH AND INCOME R6	Continuing
CSZIX	COHEN & STEERS REAL ESTATE SECURITIES Z	Continuing
DCZRX	DELAWARE SMALL CAP CORE R6	Continuing
MKDVX	BLACKROCK EQUITY DIVIDEND K	Continuing
NRGSX	NEUBERGER BERMAN GENESIS R6	Continuing
PTTRX	PIMCO TOTAL RETURN INSTL	Continuing
RGAGX	AMERICAN FUNDS GROWTH FUND OF AMER R6	Continuing
RNWGX	AMERICAN FUNDS NEW WORLD R6	Continuing
VASGX	VANGUARD LIFESTRATEGY GROWTH INV	Continuing
VFIAX	VANGUARD 500 INDEX ADMIRAL	Continuing
VIGIX	VANUARD GROWTH INDEX INSTITUTIONAL	Continuing
VIMAX	VANGUARD MID-CAP INDEX ADMIRAL	Continuing
VSCGX	VANGUARD LIFESTRATEGY CNSRV GR INV	Continuing
VSGDX	VANGUARD SHORT-TERM FEDERAL ADM	Continuing
VSMAX	VANGUARD SMALL-CAP INDEX ADM	Continuing
VSMGX	VANGUARD LIFESTRATEGY MOD GR INV SHRS	Continuing
VTPSX	VANUGAURD TOTAL INTL STOCK IDC INSTPLS	Continuing
VWEAX	VANGUARD HIGH-YIELD CORPORATE ADM	Continuing
VTINX	VANGUARD TARGET RETIREMENT INCOME FUND	Continuing
VTTSX	VANGUARD TARGET RETIREMENT 2060 FUND	Continuing
VFFVX	VANGUARD TARGET RETIREMENT 2055 FUND	Continuing
VFIFX	VANGUARD TARGET RETIREMENT 2050 FUND	Continuing

Symbol	Fund Name	Fund Transfer Path
VTIVX	VANGUARD TARGET RETIREMENT 2045 FUND	Continuing
VFORX	VANGUARD TARGET RETIREMENT 2040 FUND	Continuing
VTTHX	VANGUARD TARGET RETIREMENT 2035 FUND	Continuing
VTHRX	VANGUARD TARGET RETIREMENT 2030 FUND	Continuing
VTTVX	VANGUARD TARGET RETIREMENT 2025 FUND	Continuing
VTWNX	VANGUARD TARGET RETIREMENT 2020 FUND	Continuing
SNVXX	SCHWAB GOVERNMENT MONEY INV	Freezing
CGRIX	CALAMOS GROWTH FUND I	Sell only
CMDYX	COLUMBIA MID CAP INDEX FUND I3	Sell only
FEORX	FIRST EAGLE OVERSEAS FUND R6	Sell only
FKALX	FEDERATED HERMES KAUFMANN SMALL CAP FUND R6	Sell only
FZAIX	FIDELITY ADVISOR INTERNATIONAL DISCOVERY FUND Z	Sell only
GGSEX	GOLDMAN SACHS GROWTH STRATEGY PORTFOLIO R6	Sell only
GIPIX	GOLDMAN SACHS BALANCED STRATEGY PORTFOLIO I	Sell only
GIPUX	GOLDMAN SACHS BALANCED STRATGY PORTFOLIO R6	Sell only
GOIIX	GOLDMAN SACHS GROWTH AND INCOME I	Sell only
GOIUX	GOLDMAN SACHS GROWTH AND INCOME R6	Sell only
HWLIX	HOTCHKIS & WILEY LARGE CAP VALUE FUND I	Sell only
HWLZX	HOTCHKIS & WILEY LARGE CAP VALUE FUND Z	Sell only
ITHAX	THE HARTFORD CAPITAL APPRECIATION FUND A	Sell only
ITHVX	THE HARTFORD CAPITAL APPRECIATION R6	Sell only
MIGWX	MARISCO GROWTH FUND I	Sell only
NRREX	NEUBERGER BERMAN REAL ESTATE FUND R6	Sell only
PCRIX	PIMCO COMMODITY REAL RET STRATEGY I	Sell only

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PEOPX	BNY MELLON S&P 500 INDEX FUND	Sell only
PTLDX	PIMCO LOW DURATION I	Sell only
PZFBVX	JOHN HANCOCK CLASSIC VALUE FUND A	Sell only
JCVWX	JOHN HANCOCK CLASSIC VALUE FUND R6	Sell only
RIDGX	AMERICAN FUNDS THE INCOME FUND OF AMERERICA R6	Sell only
TGIRX	THORNBURG INTERNATIONAL EQUITY FUND R6	Sell only
VMCIX	VANGUARD MID-CAP INDEX FUND I	Sell only
VSCIX	VANGUARD SMALL-CAP INDEX FUND I	Sell only
VTSNX	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND I	Sell only
VTIAX	VANGUARD TOTAL INTERNATIONAL STOCK INDEX FUND A	Sell only
FHRRX	FRANKLIN HIGH INCOME FUND R6	Sell only
FAIDX	FIDELITY ADVISOR INTERNATIONAL DISCV A	Sell only
FKAIX	FEDERATED HERMES KAUFMANN SMALL CAP IS	Sell only
GGSEX	GOLDMAN SACHS GROWTH STRATEGY INSTL	Sell only
HWLAX	HOTCHKIS % WILEY LARGE CAP FDML VALUE A	Sell only
ITHVX	HARTFORD CAPITAL APPRECIATION R6	Sell only
MGRIX	MARISCO GROWTH	Sell only
NRREX	NEUBERGER BERMAN REAL ESTATE R6	Sell only
TGVAX	THORNBURG INTERNATIONAL EQUITY A	Sell only
VIGAX	VANGUARD GROWTH INDEX ADMIRAL	Sell only