

INVESTMENT CHOICES MAP

Kaiser Permanente Retirement Plan

3/3/2005

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Data is believed to be accurate, but errors may occur and no guarantee of accuracy is made. Some investment choices may not be listed. () indicates similar proxy fund.

This investment map is a tool for categorizing investment choices into their closest matching asset classes. A category may change or drift over time. Fund names can be misleading.

Some asset classes may offer multiple choices. Closer analysis may be used to select a specific investment from among several choices. Fund name suffixes indicate share class.

Past performance does not guarantee future results. Periods of overperformance may be followed by underperformance. Proper diversification is recommended.

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ASSET CLASS

Visit our web site to view our Market Tracker Wizard Model showing our latest analysis of current investment trends.

#	Cash:					
1	Money market/muni money mkt	Interest Income Fund				
2	Stable value/GIC					
3	Ultrashort bond					
Bonds:						
4	Govt & agency, short term					
5	Govt & agency, medium term					
6	Municipal, short/medium term					
7	Inflation indexed					
8	Corporate, short term					
9	Corporate, medium term	Vanguard Total Bond Market Index- VBMFX				
10	Zero coupon, medium term					
11	Strategic & multi-market					
12	Corporate, floating rate					
13	High yield, medium term					
14	Inverted bonds, long term					
Foreign bonds:						
15	Global bond					
16	International bond					
17	Emerging markets bond					
Hybrids:						
18	Convertibles					
19	Domestic hybrid	Vanguard Wellington- VWELX	Vang LifeStrategy Income- VASIX			
20	Global hybrid	Vanguard LifeStrategy Moderate Growth- VSMGX	Vang LifeStrategy Cons Growth- VSCGX			
U.S. stocks:						
21	Large cap value	Vanguard Value Index Fund- VIVAX				
22	Mid-cap value					
23	Small cap value					
24	Micro cap value					
25	(SP500) Large cap core/blend	Vanguard Total Stock Market Index- VTSMX	Vang PrimeCap- VPMCX	Vang Calvert Soc Index- VCSIX	Vang LS Growth- VASGX	Fidelity- FFIDX
26	(SP400) Mid-cap core/blend					
27	(R2000) Small cap core/blend					
28	Large cap growth (NASDAQ)	Marsico Growth Equity- MGRIX				
29	Mid-cap growth	Essex Aggressive Growth- (MEAGX)				
30	Small cap growth	Vanguard Explorer- VEXPX				
31	Micro cap growth					
Foreign stocks:						
32	Global value:					
33	International value:					
34	Global	Alliance Bernstein Global Research Growth- ABZYX				
35	International	Vanguard Intl Growth- VWIGX				
36	International small cap	T Rowe Price Intl Discovery- PRIDX				
37	Europe					
38	Diversified Asia Pacific (w/Japan)					
39	Asia Pacific (ex-Japan)					
40	Japan					
41	Japan Small Cap					
42	Emerging Markets (Diversified)					
43	China & Hong Kong					
44	Latin America					
45	Eastern Europe & Russia					
46	India					
47						
Sectors:						
48	Consumer industries					
49	Gold & precious metals:					
50	Transportation:					
51	Financial services					
52	Utilities					
53	Real estate					
54	Energy:					
55	Natural resources:					
56	CRB Commodity Index:					
57	Leisure					
58	Biotechnology:					
59	Health care:					
60	Communications					
61	Technology					
62	Internet					
Alternative Investments:						
63	Multi-sector (Sector rotation):					
64	M&A (Merger & Acquisition):					
65	Bear, short					
66	Mkt neutral, long/short, hedge					
67	Company Stock					