

As of 6/30/2021

	Ticker	Return						
		QTD	YTD	1 Year	3 Years	5 Years	10 Years	20 Years
US Total Market								
DFA US Core Equity 1 I	DFEOX	7.0	16.7	47.1	16.6	16.9	13.9	—
DFA US Core Equity 2 I	DFQTX	6.5	17.7	49.5	16.0	16.4	13.4	—
Dimensional US Core Equity 2 ETF	DFAC	6.5	17.0	48.7	15.9	16.3	13.3	—
Dimensional US Equity ETF	DFUS	8.3	14.9	43.5	18.5	17.9	14.6	—
Russell 3000 TR USD	—	8.2	15.1	44.2	18.7	17.9	14.7	8.9
US Value								
DFA Tax-Managed US Marketwide Value II	DFMVX	4.8	18.8	48.5	11.8	12.9	12.2	7.9
Russell 3000 Value TR USD	—	5.2	17.7	45.4	12.2	12.0	11.5	7.8
US Large Cap								
DFA US Large Company I	DFUSX	8.5	15.2	40.8	18.6	17.6	14.8	8.6
S&P 500 TR USD	—	8.5	15.3	40.8	18.7	17.6	14.8	8.6
US Large Cap Value								
AQR Large Cap Multi-Style R6	QCERX	6.4	15.8	42.4	13.6	15.1	—	—
DFA US Large Cap Value III	DFUVX	5.2	20.8	50.7	10.9	12.7	12.0	8.6
Russell 1000 Value TR USD	—	5.2	17.0	43.7	12.4	11.9	11.6	7.7
US Small Cap								
DFA US Micro Cap I	DFSCX	4.5	26.9	70.4	10.3	14.4	12.1	10.0
DFA US Small Cap I	DFSTX	4.2	23.3	65.0	11.2	14.0	11.9	9.7
Dimensional US Small Cap ETF	DFAS	3.8	22.5	63.3	10.9	14.0	11.9	8.8
Russell 2000 TR USD	—	4.3	17.5	62.0	13.5	16.5	12.3	9.3
US Small Cap Value								
Bridgeway Omni Small-Cap Value N	BOSVX	8.0	39.8	94.9	7.8	12.8	—	—
Bridgeway Omni Tax-Managed Sm-Cp Val N	BOTSX	7.9	39.3	93.5	7.1	12.3	10.1	—
DFA US Small Cap Value I	DFSVX	4.0	31.6	80.4	8.6	12.4	10.5	9.9
DFA US Targeted Value I	DFFVX	4.2	30.4	80.0	10.1	13.1	11.0	10.3
Dimensional US Targeted Value ETF	DFAT	3.3	26.6	72.5	8.7	12.2	11.1	9.1
Vericimetry US Small Cap Value	VYSVX	3.8	30.1	77.6	8.7	12.1	—	—
Russell 2000 Value TR USD	—	4.6	26.7	73.3	10.3	13.6	10.8	9.2
International Total Market								
DFA TA World ex US Core Equity I	DFTWX	5.9	12.4	43.0	8.4	11.1	5.7	—
DFA World ex US Core Equity Instl	DFWIX	6.2	12.7	43.2	8.6	11.1	—	—
MSCI ACWI Ex USA NR USD	—	5.5	9.2	35.7	9.4	11.1	5.4	6.5
International Developed Total Market								
DFA International Core Equity I	DFIEX	5.4	11.8	40.2	7.6	10.7	6.2	—
MSCI World ex USA NR USD	—	5.6	9.9	33.6	8.6	10.4	5.7	5.9
International Large Cap Growth								
DFA Large Cap International I	DFALX	5.6	10.4	34.7	8.6	10.6	5.8	5.9
MSCI World ex USA NR USD	—	5.6	9.9	33.6	8.6	10.4	5.7	5.9
International Large Cap Value								
DFA International Value III	DFVIX	4.2	16.5	45.3	4.6	9.5	4.1	6.6

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International Large Cap Value								
DFA Tax-Managed International Value	DTMIX	4.2	15.2	43.3	4.4	9.2	3.8	6.3
MSCI World Ex USA Value NR USD	—	3.7	12.4	35.8	4.2	8.1	3.9	5.1
International Small Cap Growth								
DFA International Small Company I	DFISX	5.8	12.1	45.0	7.9	11.2	7.5	9.7
MSCI World Ex USA Small Cap NR USD	—	4.8	9.9	42.3	8.9	11.9	7.7	9.1
International Small Cap Value								
DFA International Small Cap Value I	DISVX	4.5	13.0	43.9	3.9	8.7	6.4	9.8
DFA World ex US Targeted Val Instl	DWUSX	5.9	15.7	51.2	6.6	10.4	—	—
MSCI World Ex USA Small Value NR USD	—	4.3	12.3	44.9	6.3	9.9	6.4	9.4
Emerging Markets								
DFA Emerging Markets Core Equity I	DFCEX	6.3	11.9	47.2	11.0	11.9	4.2	—
DFA Emerging Markets I	DFEMX	5.0	9.9	43.5	10.7	11.9	4.1	10.2
DFA Emerging Markets Value I	DFEVX	6.9	15.8	46.8	7.4	10.8	2.2	11.4
MSCI EM NR USD	—	5.0	7.4	40.9	11.3	13.0	4.3	10.1
Global Equity Fund								
DFA Global Equity I	DGEIX	6.4	15.8	46.3	13.7	14.6	10.7	—
MSCI World NR USD	—	7.7	13.0	39.0	15.0	14.8	10.7	7.3
Commodities								
DFA Commodity Strategy Institutional	DCMSX	14.7	22.5	47.0	4.8	3.2	-3.3	—
PIMCO Commodity Real Ret Strat Instl	PCRIX	14.9	24.8	56.9	6.7	4.4	-3.4	—
Bloomberg Commodity TR USD	—	13.3	21.1	45.6	3.9	2.4	-4.4	0.9
US REITs								
DFA Real Estate Securities I	DFREX	12.4	21.8	32.9	12.4	7.8	10.1	10.3
DJ US Select REIT TR USD	—	11.8	22.9	40.0	8.1	5.2	8.7	9.6
International REITs								
DFA International Real Estate Sec I	DFITX	7.1	9.5	32.2	5.0	4.2	5.3	—
S&P Global Ex US REIT TR USD	—	7.6	10.1	33.0	5.5	5.0	6.0	9.5
Global REITs								
DFA Global Real Estate Securities Port	DFGEX	10.5	17.3	32.5	9.7	6.5	8.2	—
S&P Global REIT TR USD	—	10.4	17.6	36.1	8.4	5.8	8.0	9.4
Market Neutral								
AQR Alternative Risk Premia R6	QRPRX	-0.4	8.4	2.0	-5.8	—	—	—
AQR Style Premia Alternative R6	QSPRX	-1.4	18.0	14.3	-7.1	-3.6	—	—
ICE BofA US 3M Trsy Bill TR USD	—	0.0	0.0	0.1	1.3	1.2	0.6	1.4
Managed Futures								
AQR Managed Futures Strategy HV R6	QMHRX	-2.5	2.0	1.1	-0.9	-5.8	—	—
SG Trend Index	—	3.3	7.4	15.1	6.5	1.5	2.6	5.1
Reinsurance								
Pioneer ILS Interval	XILSX	1.2	1.6	6.5	2.0	1.6	—	—
Stone Ridge Hi Yld Reinsurance Risk PrmI	SHRIX	0.8	1.0	6.4	3.9	3.2	—	—

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	Ticker	Return						
		QTD	YTD	1 Year	3 Years	5 Years	10 Years	20 Years
Reinsurance								
Stone Ridge Reinsurance Risk Premium Interval Fund	SRRIX	1.4	-0.8	5.0	-2.1	-2.3	—	—
SwissRe Global Cat Bond TR USD	—	1.4	2.1	6.2	4.0	3.9	5.8	—
Alternative Lending								
Cliffwater Corporate Lending I	CCLFX	2.6	5.5	12.1	—	—	—	—
Stone Ridge Alternative Lending Risk Premium Fund	LENDX	1.8	22.5	37.5	13.1	10.5	—	—
BBgBarc US High Yield Ba/B 1-5Y TR USD	—	1.9	3.5	12.2	6.3	6.1	5.6	6.6
Short-Term Fixed Income								
DFA Two-Year Global Fixed-Income I	DFGFX	0.0	0.1	0.3	1.8	1.3	1.0	2.1
FTSE WGBI 1-3 Yr Hdg USD	—	0.0	0.0	0.2	2.4	1.7	1.5	2.4
Short Municipal Bonds								
DFA Short Term Municipal Bond I	DFSMX	0.1	0.1	0.1	1.1	0.7	0.9	—
ICE BofA 1-3Y US Muni TR USD	—	0.2	0.4	1.0	2.1	1.5	1.3	2.2
US Short Government Bonds								
DFA One-Year Fixed-Income I	DFIHX	0.0	0.0	0.1	1.4	1.2	0.9	1.9
ICE BofA 1-3Y US Trsy&Agcy TR USD	—	0.0	-0.1	0.1	2.7	1.6	1.2	2.5
Intermediate-Term US Government Fixed Income								
DFA Intermediate Govt Fixed-Income I	DFIGX	1.9	-2.8	-3.3	5.2	2.3	3.1	4.7
BBgBarc US Agg Bond TR USD	—	1.8	-1.6	-0.3	5.3	3.0	3.4	4.6
Intermediate-Term Global Fixed Income								
DFA Five-Year Global Fixed-Income I	DFGBX	0.2	0.2	0.6	2.4	1.5	2.2	3.4
FTSE WGBI 1-5 Yr Hdg USD	—	0.1	-0.3	0.1	2.8	1.9	1.9	2.8
Intermediate-Term Fixed Income								
DFA Diversified Fixed Income Instl	DFXIX	1.4	-0.8	-0.5	4.1	—	—	—
BBgBarc US Agg Bond TR USD	—	1.8	-1.6	-0.3	5.3	3.0	3.4	4.6
Inflation Protected Fixed Income								
DFA Inflation-Protected Securities I	DIPSX	3.2	1.4	6.5	6.8	4.2	3.5	—
BBgBarc US Treasury US TIPS TR USD	—	3.2	1.7	6.5	6.5	4.2	3.4	5.2

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As of 6/30/2021

		Return									
	Ticker	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011
US Total Market											
DFA US Core Equity 1 I	DFEOX	16.4	30.2	-7.8	20.9	14.8	-1.3	10.5	36.6	16.9	-0.6
DFA US Core Equity 2 I	DFQTX	15.7	29.4	-9.6	18.9	16.6	-3.1	9.3	37.8	18.1	-2.1
Dimensional US Core Equity 2 ETF	DFAC	15.8	29.5	-9.4	18.8	16.3	-2.5	9.6	37.6	17.9	-2.0
Dimensional US Equity ETF	DFUS	20.7	30.9	-5.4	21.4	12.7	0.5	12.0	34.2	16.0	1.2
Russell 3000 TR USD	—	20.9	31.0	-5.2	21.1	12.7	0.5	12.6	33.6	16.4	1.0
US Value											
DFA Tax-Managed US Marketwide Value II	DFMVX	1.8	27.1	-10.1	17.2	17.4	-2.6	10.1	40.5	22.4	-2.9
Russell 3000 Value TR USD	—	2.9	26.3	-8.6	13.2	18.4	-4.1	12.7	32.7	17.5	-0.1
US Large Cap											
DFA US Large Company I	DFUSX	18.4	31.4	-4.4	21.7	11.9	1.4	13.5	32.3	15.8	2.1
S&P 500 TR USD	—	18.4	31.5	-4.4	21.8	12.0	1.4	13.7	32.4	16.0	2.1
US Large Cap Value											
AQR Large Cap Multi-Style R6	QCERX	15.0	24.4	-10.8	24.4	7.2	-0.2	—	—	—	—
DFA US Large Cap Value III	DFUVX	-0.5	25.6	-11.5	19.1	19.1	-3.3	10.2	40.6	22.2	-3.1
Russell 1000 Value TR USD	—	2.8	26.5	-8.3	13.7	17.3	-3.8	13.5	32.5	17.5	0.4
US Small Cap											
DFA US Micro Cap I	DFSCX	6.6	20.7	-11.6	11.2	25.6	-3.6	2.9	45.1	18.2	-3.3
DFA US Small Cap I	DFSTX	11.2	21.7	-13.1	11.5	23.5	-3.3	4.4	42.2	18.4	-3.1
Dimensional US Small Cap ETF	DFAS	10.4	21.9	-13.1	11.9	24.0	-3.4	3.9	43.4	18.5	-3.0
Russell 2000 TR USD	—	20.0	25.5	-11.0	14.6	21.3	-4.4	4.9	38.8	16.3	-4.2
US Small Cap Value											
Bridgeway Omni Small-Cap Value N	BOSVX	0.8	13.9	-17.1	6.0	34.5	-6.6	0.8	44.6	17.7	—
Bridgeway Omni Tax-Managed Sm-Cp Val N	BOTSX	-1.9	14.3	-16.1	5.5	34.6	-5.5	0.4	43.1	16.6	-5.4
DFA US Small Cap Value I	DFSVX	2.2	18.1	-15.1	7.2	28.3	-7.8	3.5	42.4	21.7	-7.5
DFA US Targeted Value I	DFVIX	3.8	21.5	-15.8	9.6	26.9	-5.7	2.9	43.0	19.2	-6.3
Dimensional US Targeted Value ETF	DFAT	2.3	22.1	-16.2	11.1	23.8	-3.3	4.2	43.9	20.9	-5.8
Vericimetry US Small Cap Value	VYSVX	2.8	20.2	-16.6	9.0	23.3	-5.6	2.6	44.4	19.9	—
Russell 2000 Value TR USD	—	4.6	22.4	-12.9	7.8	31.7	-7.5	4.2	34.5	18.1	-5.5
International Total Market											
DFA TA World ex US Core Equity I	DFTWX	9.1	19.8	-16.9	30.5	6.2	-3.6	-5.0	16.6	19.4	-17.0
DFA World ex US Core Equity Instl	DFWIX	9.3	20.0	-17.0	30.1	6.4	-3.8	-4.9	—	—	—
MSCI ACWI Ex USA NR USD	—	10.7	21.5	-14.2	27.2	4.5	-5.7	-3.9	15.3	16.8	-13.7
International Developed Total Market											
DFA International Core Equity I	DFIEX	7.7	21.7	-17.4	28.1	5.3	-0.2	-6.0	23.4	18.7	-15.1
MSCI World ex USA NR USD	—	7.6	22.5	-14.1	24.2	2.7	-3.0	-4.3	21.0	16.4	-12.2
International Large Cap Growth											
DFA Large Cap International I	DFALX	8.1	22.0	-14.1	25.4	3.2	-2.9	-5.2	20.7	17.7	-12.3
MSCI World ex USA NR USD	—	7.6	22.5	-14.1	24.2	2.7	-3.0	-4.3	21.0	16.4	-12.2
International Large Cap Value											
DFA International Value III	DFVIX	-2.0	15.8	-17.3	26.2	8.6	-6.1	-6.8	23.4	16.8	-16.7

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International Large Cap Value											
DFA Tax-Managed International Value	DTMIX	-1.6	15.9	-17.3	25.9	8.2	-6.4	-7.5	22.6	16.3	-16.7
MSCI World Ex USA Value NR USD	—	-3.2	17.0	-15.1	21.0	7.4	-7.7	-5.4	21.5	17.3	-11.7
International Small Cap Growth											
DFA International Small Company I	DFISX	9.3	24.2	-19.4	30.2	5.8	5.9	-6.3	27.4	18.9	-15.3
MSCI World Ex USA Small Cap NR USD	—	12.8	25.4	-18.1	31.0	4.3	5.5	-5.3	25.6	17.5	-15.8
International Small Cap Value											
DFA International Small Cap Value I	DISVX	0.8	21.0	-23.3	28.0	8.0	4.0	-5.0	32.4	22.3	-17.5
DFA World ex US Targeted Val Instl	DWUSX	5.0	17.4	-20.4	31.5	10.3	-2.1	-4.5	19.9	—	—
MSCI World Ex USA Small Value NR USD	—	2.6	22.8	-18.4	27.9	7.9	1.1	-5.9	27.7	19.5	-16.8
Emerging Markets											
DFA Emerging Markets Core Equity I	DFCEX	13.9	16.0	-15.2	36.6	12.4	-14.9	-0.9	-2.6	20.5	-20.6
DFA Emerging Markets I	DFEMX	13.9	16.0	-13.6	36.6	12.1	-15.8	-1.7	-3.1	19.2	-17.4
DFA Emerging Markets Value I	DFEVX	2.7	9.6	-11.9	33.8	19.8	-18.8	-4.4	-3.8	19.4	-25.6
MSCI EM NR USD	—	18.3	18.4	-14.6	37.3	11.2	-14.9	-2.2	-2.6	18.2	-18.4
Global Equity Fund											
DFA Global Equity I	DGEIX	13.5	26.7	-11.5	22.2	12.9	-2.7	4.6	29.1	18.2	-7.4
MSCI World NR USD	—	15.9	27.7	-8.7	22.4	7.5	-0.9	4.9	26.7	15.8	-5.5
Commodities											
DFA Commodity Strategy Institutional	DCMSX	-1.8	8.0	-11.2	2.7	13.8	-23.8	-14.6	-9.1	1.3	-12.1
PIMCO Commodity Real Ret Strat Instl	PCRIX	0.8	12.3	-13.8	2.7	14.5	-25.7	-18.1	-14.8	5.3	-7.6
Bloomberg Commodity TR USD	—	-3.1	7.7	-11.2	1.7	11.8	-24.7	-17.0	-9.5	-1.1	-13.3
US REITs											
DFA Real Estate Securities I	DFREX	-5.0	28.1	-3.0	5.7	8.4	3.2	31.1	1.4	17.5	9.0
DJ US Select REIT TR USD	—	-11.2	23.1	-4.2	3.8	6.7	4.5	32.0	1.2	17.1	9.4
International REITs											
DFA International Real Estate Sec I	DFITX	-9.0	23.5	-6.9	15.4	3.1	-3.6	11.1	2.3	33.4	-7.8
S&P Global Ex US REIT TR USD	—	-9.3	24.7	-6.5	16.7	4.0	-2.8	11.9	3.3	33.4	-7.7
Global REITs											
DFA Global Real Estate Securities Port	DFGEX	-6.7	26.4	-4.2	9.2	6.6	0.7	22.7	1.8	23.2	1.8
S&P Global REIT TR USD	—	-8.1	24.5	-4.8	8.6	6.9	0.6	22.8	2.8	23.7	1.7
Market Neutral											
AQR Alternative Risk Premia R6	QRPRX	-20.9	-2.9	-7.4	—	—	—	—	—	—	—
AQR Style Premia Alternative R6	QSPRX	-21.9	-8.1	-12.3	12.1	-0.4	8.8	—	—	—	—
ICE BofA US 3M Trsy Bill TR USD	—	0.7	2.3	1.9	0.9	0.3	0.1	0.0	0.1	0.1	0.1
Managed Futures											
AQR Managed Futures Strategy HV R6	QMHRX	-0.5	1.9	-14.3	-1.6	-13.1	2.5	—	—	—	—
SG Trend Index	—	6.3	9.2	-8.1	2.2	-6.1	0.0	19.7	2.7	-3.5	-7.9
Reinsurance											
Pioneer ILS Interval	XILSX	7.4	2.6	-2.0	-7.2	9.1	9.9	—	—	—	—
Stone Ridge Hi Yld Reinsurance Risk PrmI	SHRIX	6.9	4.6	2.8	-3.2	6.7	5.4	8.6	—	—	—

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Reinsurance											
Stone Ridge Reinsurance Risk Premium Interval Fund	SRRIX	6.8	-4.5	-6.1	-11.4	6.4	7.9	11.0	—	—	—
SwissRe Global Cat Bond TR USD	—	5.8	4.4	2.8	0.5	6.6	4.3	5.9	10.8	10.3	3.7
Alternative Lending											
Cliffwater Corporate Lending I	CCLFX	8.7	—	—	—	—	—	—	—	—	—
Stone Ridge Alternative Lending Risk Premium Fund	LENDX	10.1	4.9	5.1	6.4	—	—	—	—	—	—
BBgBarc US High Yield Ba/B 1-5Y TR USD	—	5.0	10.9	0.7	5.1	11.6	-2.7	1.8	7.2	13.7	4.6
Short-Term Fixed Income											
DFA Two-Year Global Fixed-Income I	DFGFX	0.9	2.9	1.9	0.9	1.0	0.3	0.4	0.5	1.0	0.8
FTSE WGBI 1-3 Yr Hdg USD	—	2.3	3.3	2.1	0.9	1.2	0.7	1.0	0.8	1.4	1.4
Short Municipal Bonds											
DFA Short Term Municipal Bond I	DFSMX	0.8	1.6	1.2	1.1	0.0	1.2	0.6	0.5	0.7	2.4
ICE BofA 1-3Y US Muni TR USD	—	2.2	2.9	1.8	1.0	0.3	0.8	0.7	1.1	1.0	2.4
US Short Government Bonds											
DFA One-Year Fixed-Income I	DFIHX	0.6	2.4	1.9	0.9	0.8	0.3	0.3	0.3	0.9	0.6
ICE BofA 1-3Y US Trsy&Agcy TR USD	—	3.1	3.5	1.6	0.4	0.9	0.6	0.6	0.4	0.5	1.6
Intermediate-Term US Government Fixed Income											
DFA Intermediate Govt Fixed-Income I	DFIGX	9.1	7.2	0.9	2.2	1.2	1.8	5.2	-3.5	3.7	9.4
BBgBarc US Agg Bond TR USD	—	7.5	8.7	0.0	3.5	2.6	0.5	6.0	-2.0	4.2	7.8
Intermediate-Term Global Fixed Income											
DFA Five-Year Global Fixed-Income I	DFGBX	1.5	4.0	1.7	2.0	1.8	1.4	2.9	-0.4	4.8	4.5
FTSE WGBI 1-5 Yr Hdg USD	—	3.2	3.9	2.1	1.1	1.5	1.0	1.9	0.6	2.1	2.3
Intermediate-Term Fixed Income											
DFA Diversified Fixed Income Instl	DFXIX	5.9	5.5	1.1	1.7	—	—	—	—	—	—
BBgBarc US Agg Bond TR USD	—	7.5	8.7	0.0	3.5	2.6	0.5	6.0	-2.0	4.2	7.8
Inflation Protected Fixed Income											
DFA Inflation-Protected Securities I	DIPSX	11.7	8.5	-1.3	3.3	4.7	-1.2	3.4	-9.3	7.5	14.5
BBgBarc US Treasury US TIPS TR USD	—	11.0	8.4	-1.3	3.0	4.7	-1.4	3.6	-8.6	7.0	13.6

The performance data quoted represents past performance. Past performance does not guarantee future results. Please review the additional disclosures included on the last page of this report.

As of 6/30/2021

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Returns are shown in percent and those of one year or longer have been annualized.

Returns listed assume reinvestment of all dividend and capital gain distributions; they do not reflect the deduction of any fees charged by an independent investment advisor or other service provider to an individual account. Such fee, if taken into consideration, will reduce the performance quoted above.

Investors cannot invest directly in an index. Indexes are unmanaged and reflect reinvested dividends and/or distributions, but do not reflect sales charges, commissions, expenses or taxes.

Index used for comparison is deemed the best available and may differ from prospectus index. Some indexes are not available for full period of the fund.

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Source: Morningstar Direct

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