

Customized investment options

CUSTOMIZED INVESTMENT OPTIONS

Customized Age-Based The allocation mix in the Customized Age-Based and Customized Static investment options will vary based on the allocation chosen by the account owner. You create your Customized investment option through your online account. In chart below, the left column displays the list of my529 single-fund portfolios and their symbols; the right column shows the corresponding underlying investment and symbol.

Customized Static

MYS29 UNDERLYING INVESTMENTS				
my529 Single-Fund Portfolios	Symbol	=	Corresponding Underlying Investment	Symbol
Domestic stocks				
my529 Total Stock Market Index	UTVTX	=	Vanguard Total Stock Market Index Fund	VSTX
my529 Institutional Index	UTVLX	=	Vanguard Institutional Index Fund	VIIIX
my529 Value Index	UTVVX	=	Vanguard Value Index Fund	VIVIX
my529 US Large Cap Value	UTDLX	=	Dimensional U.S. Large Cap Value Portfolio	DFLVX
my529 Growth Index	UTVGX	=	Vanguard Growth Index Fund	VIGIX
my529 Mid Cap Index	UTVMX	=	Vanguard Mid-Cap Index Fund	VMCPX
my529 Small Cap Index	UTVSX	=	Vanguard Small-Cap Index Fund	VSCPX
my529 Small Cap Value Index ¹	UTVUX	=	Vanguard Small-Cap Value Index Fund	VSIIX
my529 US Small Cap Value ¹	UTDSX	=	Dimensional U.S. Small Cap Value Portfolio	DFSVX
my529 Small Cap Growth Index ¹	UTVKX	=	Vanguard Small-Cap Growth Index Fund	VSGIX
my529 Real Estate Securities ¹	UTDRX	=	Dimensional Real Estate Securities Portfolio	DFREX
my529 FTSE Social Index	UTVFX	=	Vanguard FTSE Social Index Fund	VFTNX
my529 US Sustainability	UTDUX	=	Dimensional U.S. Sustainability Core 1 Portfolio	DFSIX
International stocks				
my529 Total International Stock Index	UTVIX	=	Vanguard Total International Stock Index Fund	VTISX
my529 Developed Markets Index	UTVDX	=	Vanguard Developed Markets Index Fund	VDIPX
my529 International Value Factor ¹	UTDIX	=	Dimensional International Value Portfolio	DFIVX
my529 International Growth ¹	UTVWX	=	Vanguard International Growth Fund	VWILX
my529 Emerging Markets Stock Index ¹	UTVEX	=	Vanguard Emerging Markets Stock Index Fund	VEMRX
Global stocks				
my529 Global Equity	UTDGX	=	Dimensional Global Equity Portfolio	DGEIX
Domestic bonds				
my529 One-Year Fixed Income	UTDOX	=	Dimensional One-Year Fixed Income Portfolio	DFIHX
my529 Short-Term Inflation-Protected Sec Index	UTVPX	=	Vanguard Short-Term Inflation-Protected Securities Index Fund	VTSPX
my529 Inflation Protected Securities	UTDPX	=	Dimensional Inflation-Protected Securities Portfolio	DIPSX
my529 Short-Term Bond Index	UTVNX	=	Vanguard Short-Term Bond Index Fund	VBIPX
my529 Total Bond Market Index	UTVBX	=	Vanguard Total Bond Market Index Fund	VTBSX
my529 Short-Term Investment Grade	UTVAX	=	Vanguard Short-Term Investment-Grade Fund	VFSIX
my529 Investment Grade	UTDAX	=	Dimensional Investment Grade Portfolio	DFAPX
my529 High-Yield Corporate ¹	UTVHX	=	Vanguard High-Yield Corporate Fund	VWEAX
International bonds				
my529 Total International Bond Index	UTVOX	=	Vanguard Total International Bond Index Fund	VTIFX
Global bonds				
my529 Variable Five-Year Global Fixed Income	UTDFX	=	Dimensional Five-Year Global Fixed Income Portfolio	DFGBX
Principal preservation				
my529 Stable Value	UTPSVX	=	PIMCO Interest Income Fund	N/A
my529 FDIC-Insured Portfolio ²	UTFIX	=	FDIC-Insured Savings Account	N/A

1. An investment allocation to this fund may not exceed 25% in the account. For the Customized Age-Based investment option, this cap applies to the allocation for each age bracket.
2. See Part 7, Investment Information, for information on FDIC-Insured accounts.