

401(k) Allocation Recommendations for Existing Clients



Q4/2026 Hilcorp 401(k)

Moderately Conservative Allocation

20% JP Morgan Large Cap Growth
25% Dodge & Cox Stock
25% Fidelity 500 Index
4% MFS International Growth
12% T Rowe Price US Treasury
14% Dodge & Cox Income

Moderate Allocation

24% JP Morgan Large Cap Growth
25% Dodge & Cox Stock
27% Fidelity 500 Index
5% MFS International Growth
1% DFA Emerging Markets
10% T Rowe Price US Treasury
8% Dodge & Cox Income

Moderately Aggressive Allocation

28% JP Morgan Large Cap Growth
25% Dodge & Cox Stock
30% Fidelity 500 Index
5% MFS International Growth
2% DFA Emerging Markets
10% T Rowe Price US Treasury

Investing in institutional funds within the Hilcorp 401(k) plan is subject to risk and potential loss of principal. There is no assurance or certainty that any investment or strategy will be successful in meeting its objectives. Investors should consider the investment objectives, risks, charges, and expenses of the funds carefully before investing. The Investment Options Guide, the most recent quarterly investment performance statements, and the Summary Plan Descriptions contain this and other information about the funds. Contact T.Rowe Price directly at (800)922-9945 to obtain a copy of this information which should be read carefully before investing or sending money.

If you do not know your risk tolerance and which of the above allocations is most suitable for you, please visit our website at www.capstoneria.com to use our free risk assessment tool.