

Item 11



County of Fresno

Deferred Compensation Plan

1Q2021 Quarterly Dashboard

Nationwide Retirement Solutions

Jake Sours
Program Director

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Managing Director

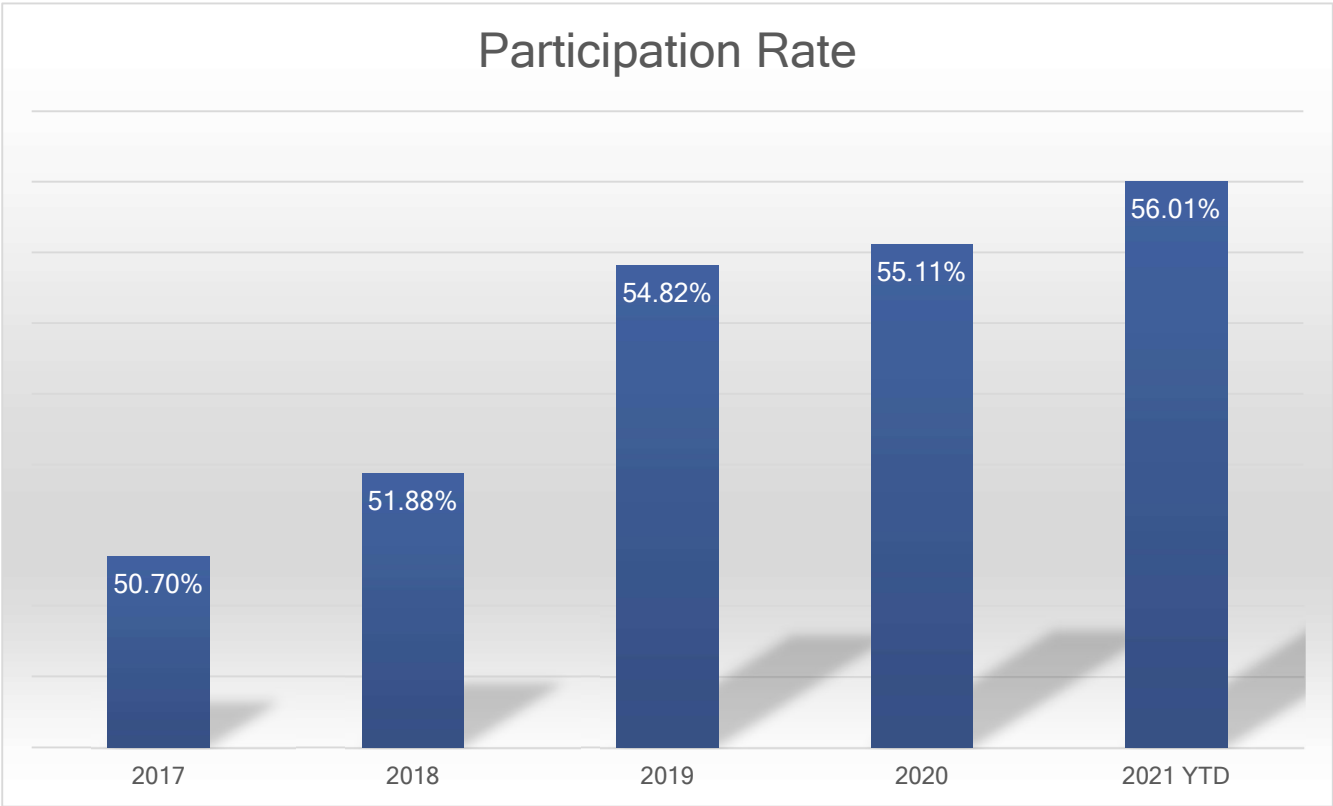
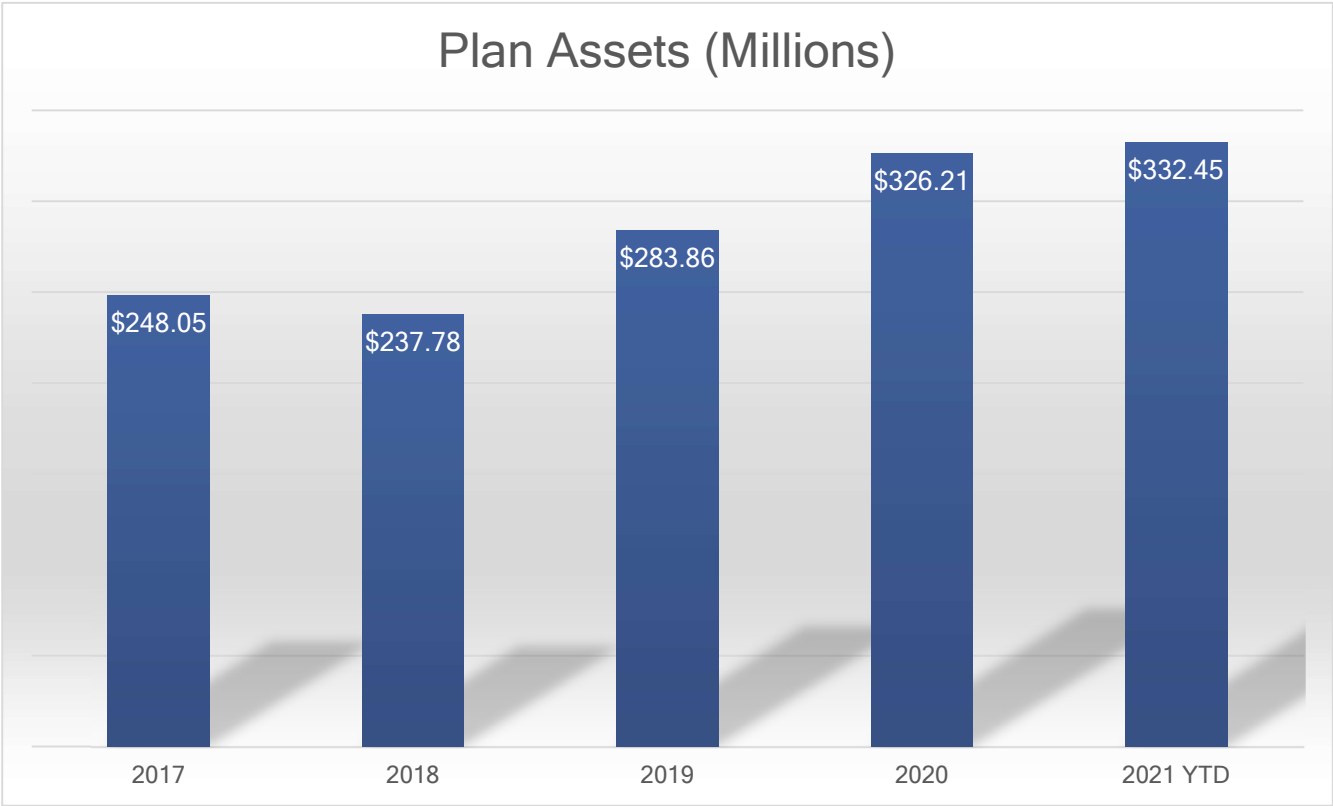


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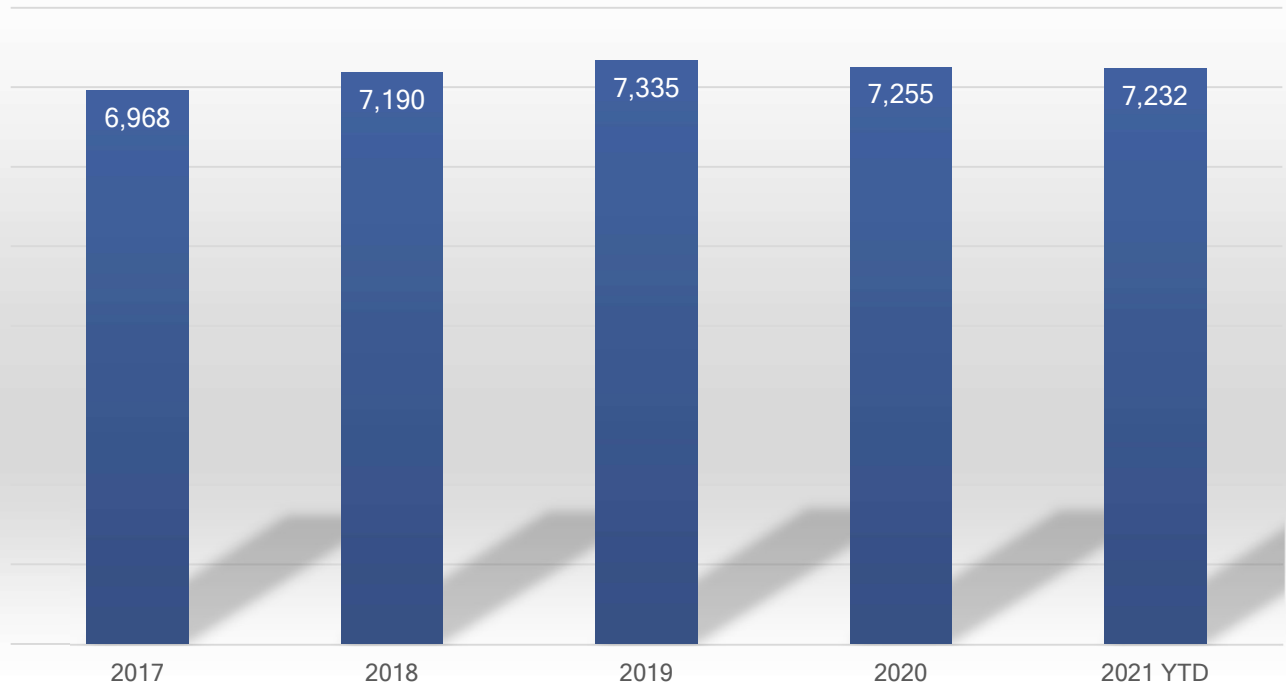
Section 1	Executive Summary
Section 2	Plan Health Report
Section 3	Explicit Asset Fee Summary
Section 4	Fee Normalization Calculation

Executive Summary

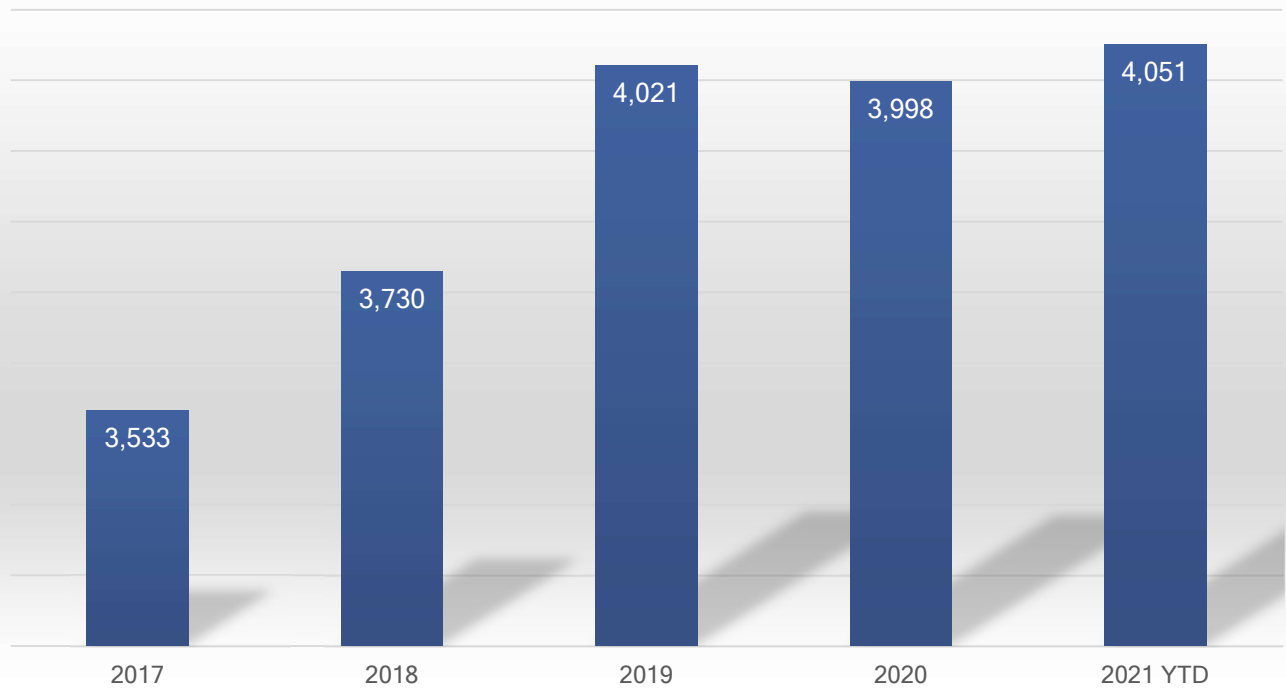
EXECUTIVE SUMMARY



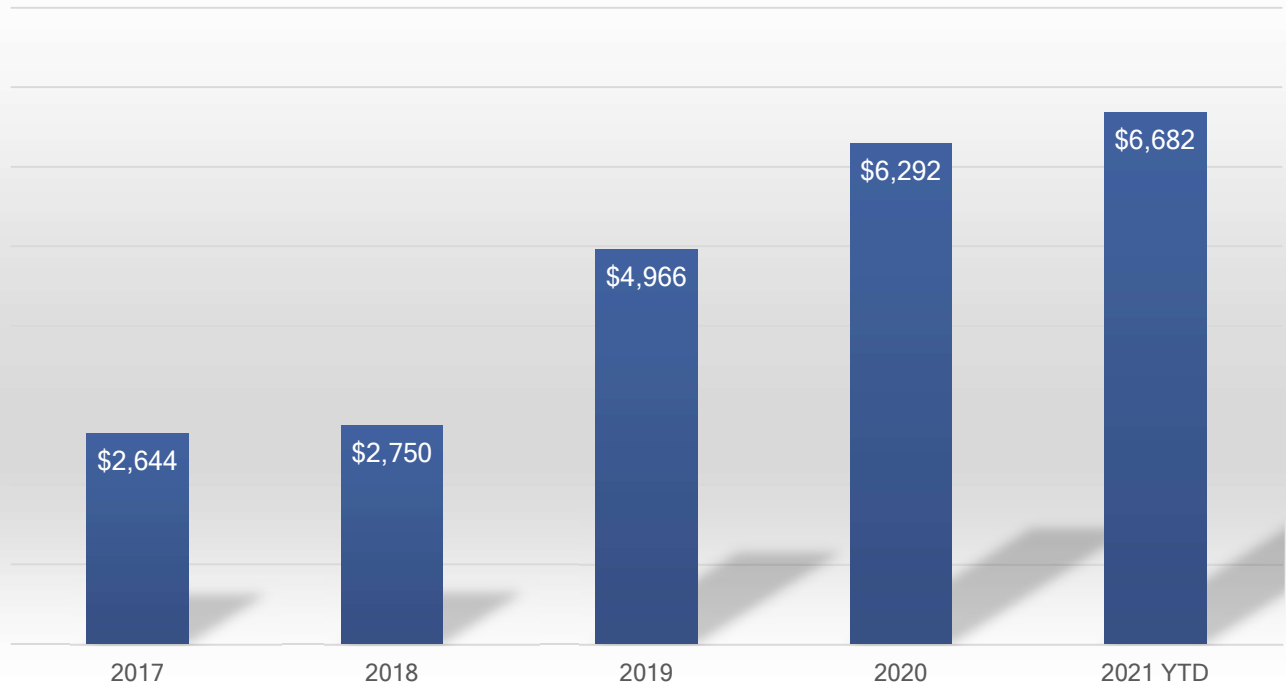
Eligible Employees



Actively Deferring Participants



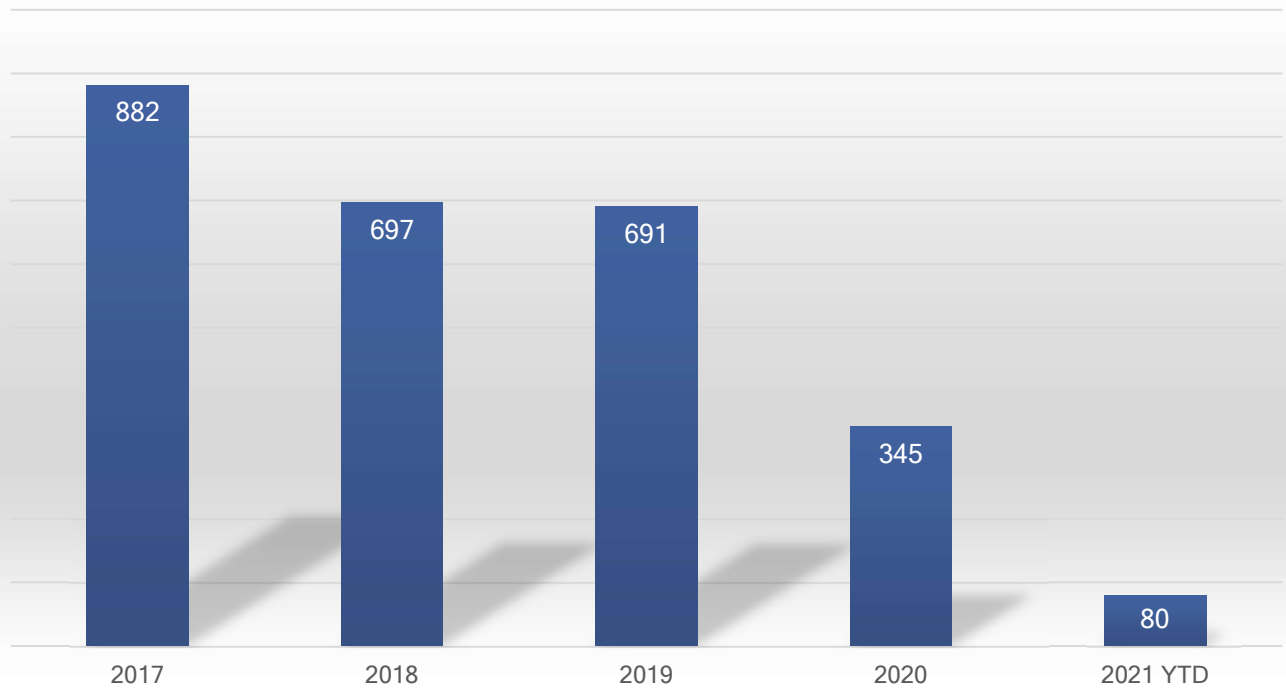
Average Annualized Deferral



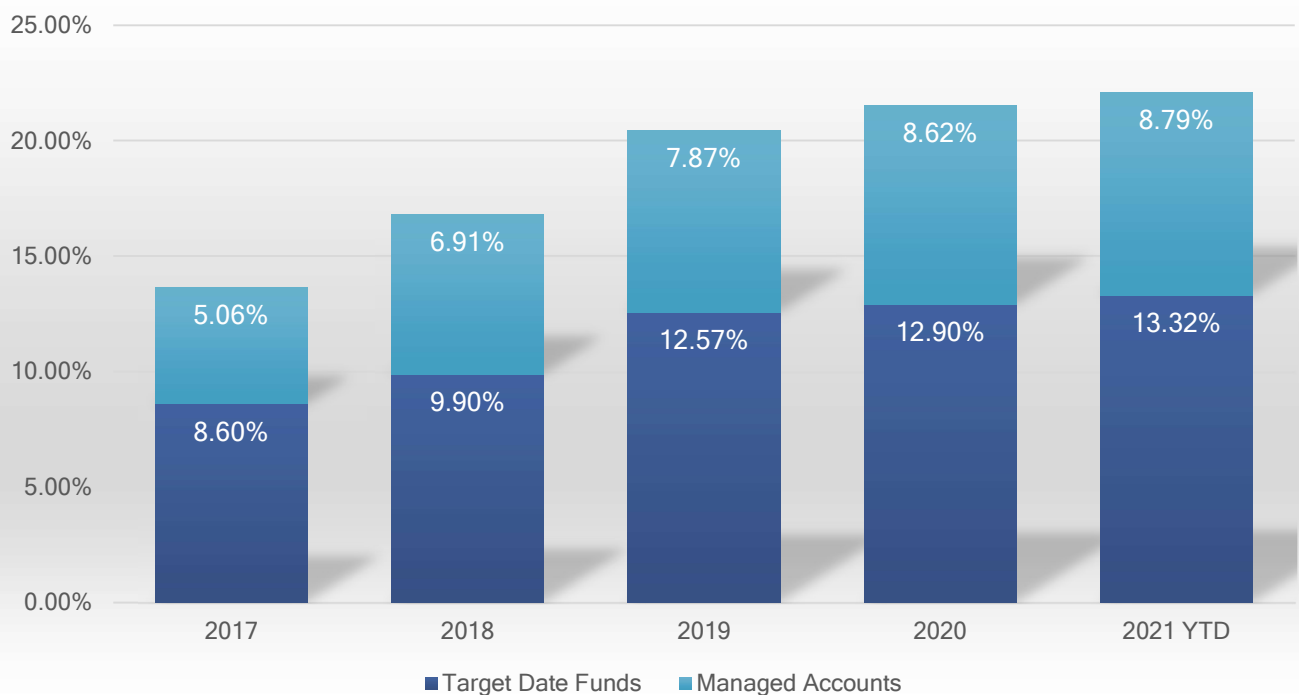
Average Account Balance



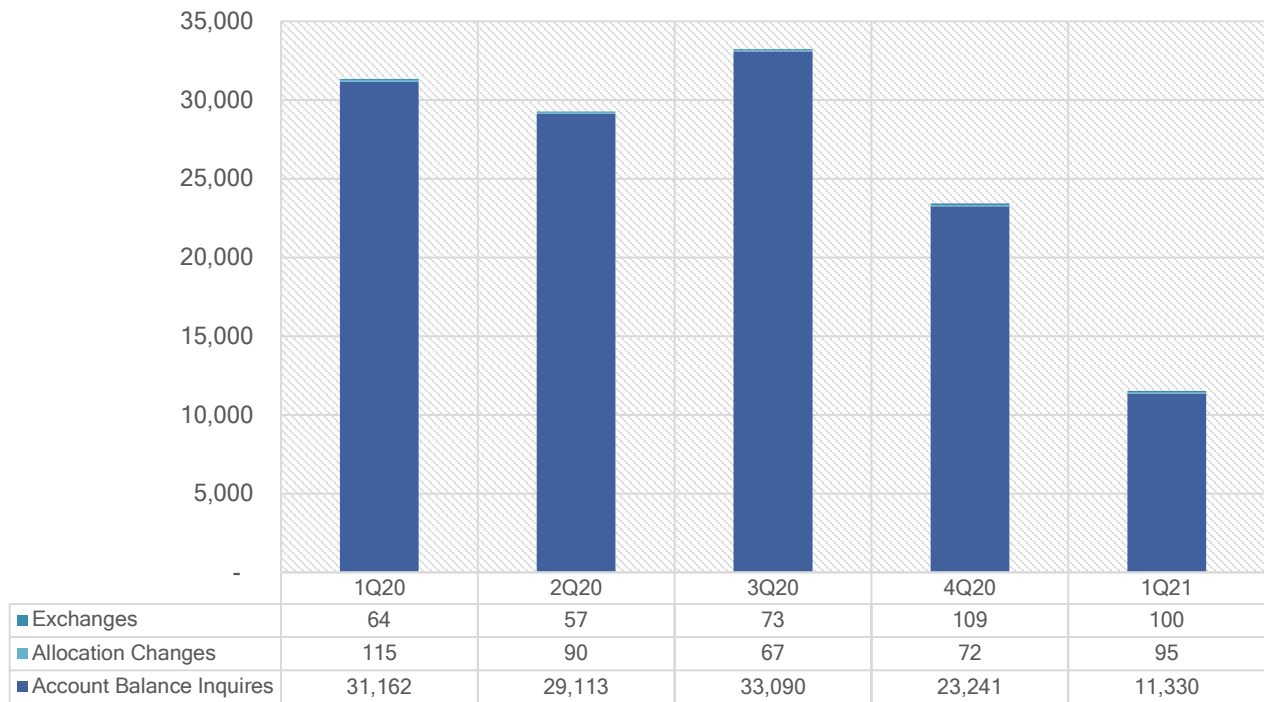
New Enrollments



"Do it for Me" Utilization

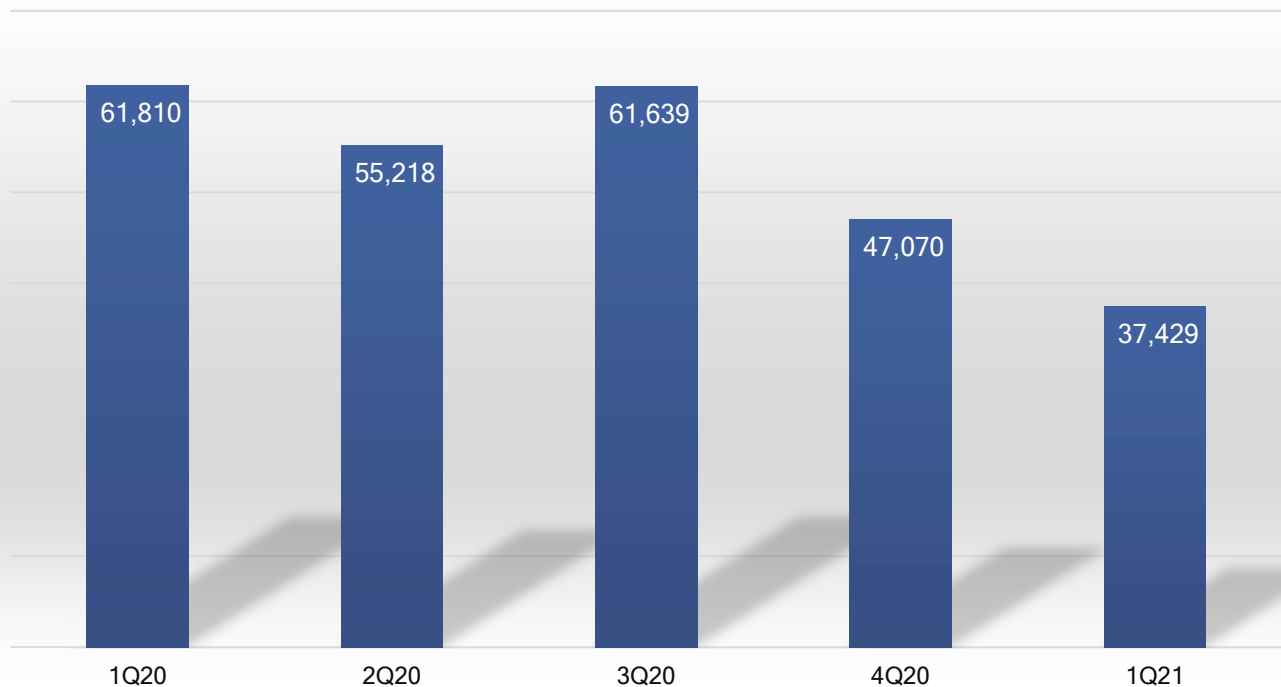


Web Activities by Category



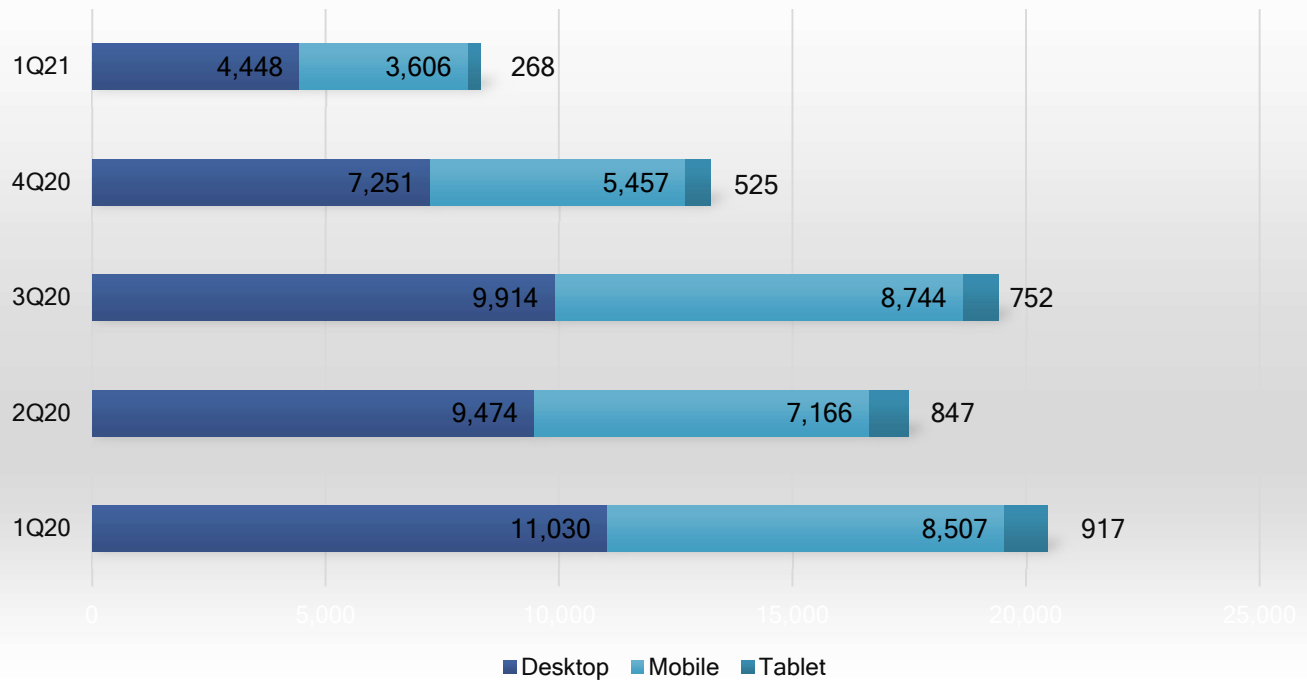
Note: Website statistics for the 1Q2021 are understated due to a change in the measurement of account balance inquires.

Web Utilization¹

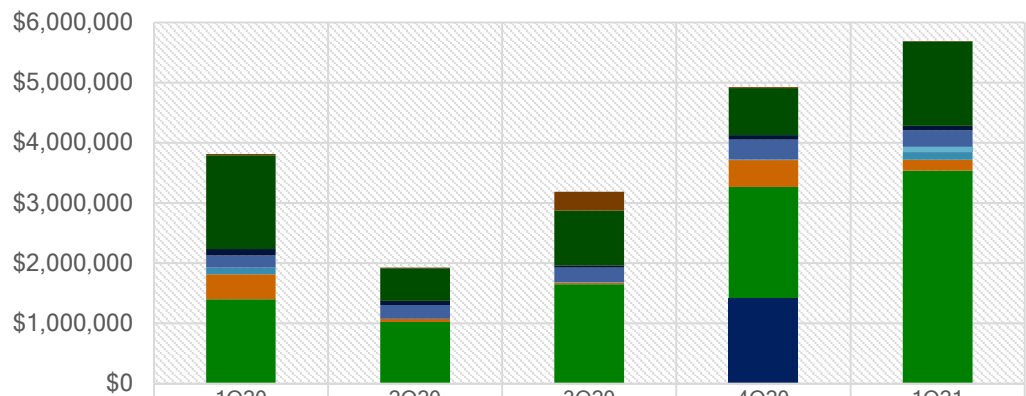


¹Web Utilization represents total web hits for the quarter

Devices

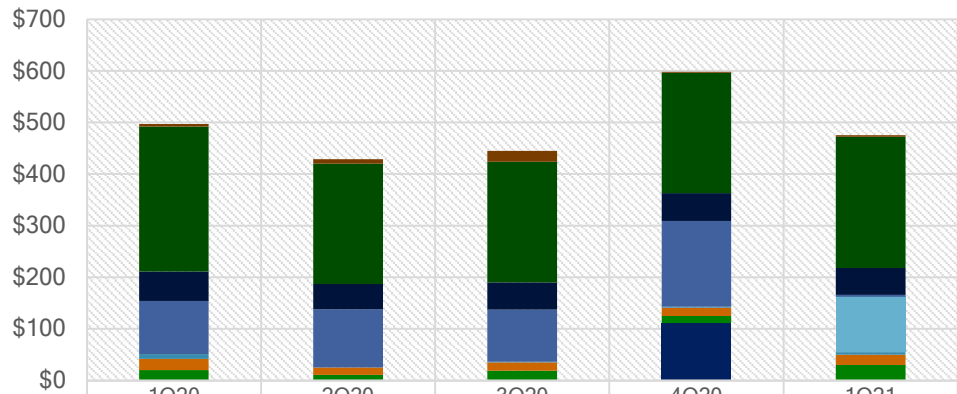


Distributions Amount



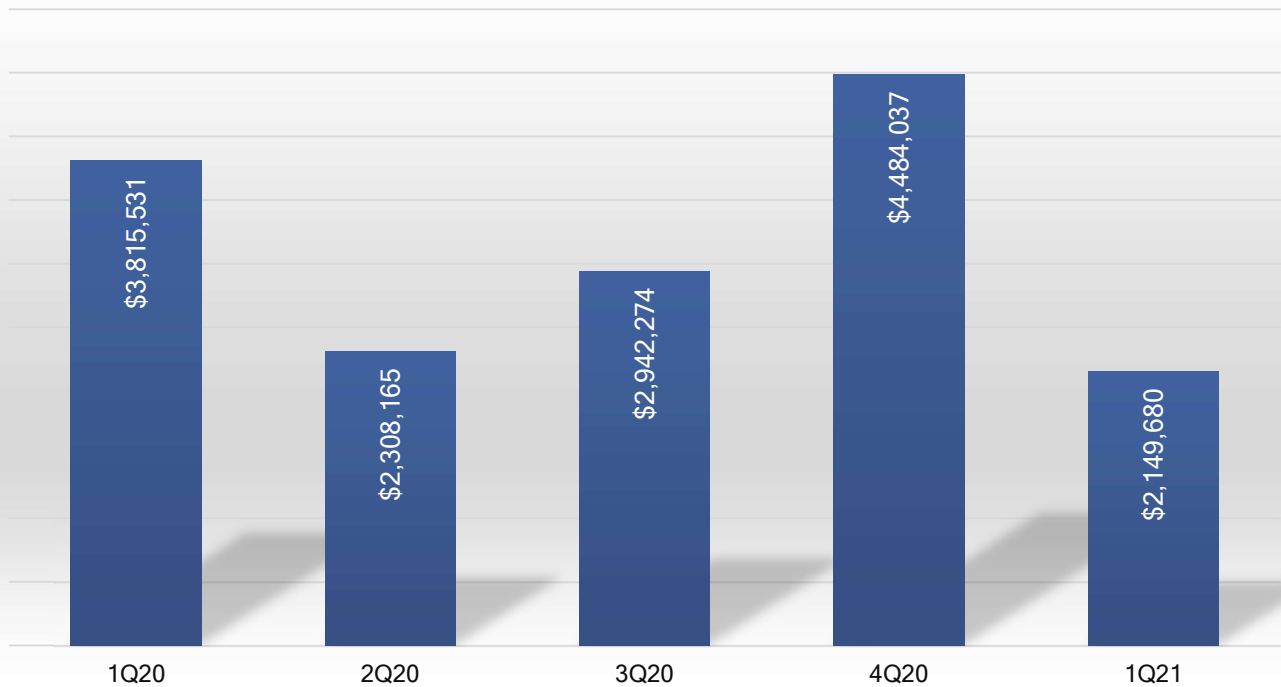
	1Q20	2Q20	3Q20	4Q20	1Q21
UE	\$23,485	\$11,842	\$317,979	\$17,719	\$3,217
Termination	\$1,553,861	\$543,909	\$907,194	\$779,936	\$1,401,123
Retirement	\$110,022	\$67,900	\$34,285	\$74,777	\$76,685
RMD	\$200,494	\$229,527	\$240,844	\$332,648	\$270,055
QDRO	\$0	\$0	\$0	\$0	\$90,000
In-Service	\$112,353	\$0	\$10,000	\$11,500	\$130,847
Death	\$413,418	\$53,090	\$30,075	\$442,117	\$177,753
Rollovers/Transfers Out	\$1,401,897	\$1,023,329	\$1,649,085	\$1,846,209	\$3,539,718
Corona Related Distributions (CRDs)	\$0	\$0	\$0	\$1,423,444	\$0

Distributions Count



UE	5	9	21	2	3
Termination	281	233	234	233	254
Retirement	57	49	53	54	52
RMD	103	113	101	166	4
QDRO	0	0	0	0	107
In-Service	9	0	1	2	5
Death	22	14	16	16	20
Rollovers/Transfers Out	20	11	19	14	30
Corona Related Distributions (CRDs)	0	0	0	111	0

Total Distributions



Year to Date Rollovers & Transfers Out

Payee	Number of Participants	External Transfer Out 1/1/21 to 3/31/21
AMERICAN FUNDS SERVICES COMPANY	2	\$ (540,870.87)
CALSTRS PENSION 2	1	\$ (17,636.79)
CAPITAL BANK AND TRUST COMPANY	2	\$ (150,000.00)
CHARLES SCHWAB & CO INC	3	\$ (90,751.39)
FIDELITY MANAGEMENT TRUST COMPANY	2	\$ (38,799.11)
FIIOC	1	\$ (17,071.90)
MERRILL LYNCH PIERCE FENNER & SMITH INC	1	\$ (182,946.07)
NYLIAC	1	\$ (153,468.86)
PFS INVESTMENTS INC	1	\$ (50,028.68)
RBC CAPITAL MARKETS LLC	1	\$ (434,072.29)
TDAMERITRADE CLEARING INC	1	\$ (5,000.00)
UBS FINANCIAL SERVICES INC	2	\$ (904,022.28)
UNKNOWN	1	\$ (13,989.73)
VANGUARD FIDUCIARY TRUST COMPANY	1	\$ (847,873.04)
VANTAGEPOINT TRANSFER AGENTS-457	1	\$ (4,480.98)
WELLS FARGO CLEARING SERVICES LLC	1	\$ (38,241.15)
TOTAL	22	\$ (3,489,253.14)

Plan Health Report

PLAN HEALTH REPORT

COUNTY OF FRESNO CA

as of 03/31/2021



We value your partnership and the opportunity to offer a competitive, effective retirement plan to your participants. Through diligent work and thought leadership, we'll help you grow your plan and help your participants prepare for and live in retirement. This report includes balance information, participant demographics, contribution highlights and retirement readiness numbers. Together, we can use this information to help your participants achieve greater financial wellness.

Our goal is to help you objectively evaluate your Plan's performance and how it performs against other plans like yours. Since Nationwide Retirement Solutions is one of the largest retirement plan providers in the industry, we are uniquely positioned to compare your Plan to many others of similar asset size. By comparing the current year information to previous years, you can see how your Plan is performing, where your educational efforts are working and what areas offer opportunities for improvement. The "Peer Group" comparisons used in this report are based on cases with assets of: \$100 million - \$1 billion.

Thank you for your valued business. We look forward to helping improve retirement readiness for your participants.

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Quick plan facts

(as of 03/31/2021)

Metric	Current value	%Change from last quarter	%Change from last year
Participant Core Assets	\$326,421,957	2.00%	36.00%
Total Participant Count	6,820	0.28%	1.84%
Total New Enrollments YTD Count	80	-76.81%	-11.11%
Total Deferrals YTD	\$3,787,318	-75.00%	6.00%
Total Rollovers-In YTD	\$60,034	-94.00%	-87.00%
ProAccount Participant Count	698	2.65%	10.97%
ProAccount Assets	\$29,238,444	4.00%	53.00%

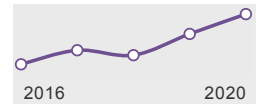
EXECUTIVE SUMMARY

457 Plan Summary



TOTAL PARTICIPANT ACCOUNT BALANCE
(as of 03/31/2021)

\$332,453,999

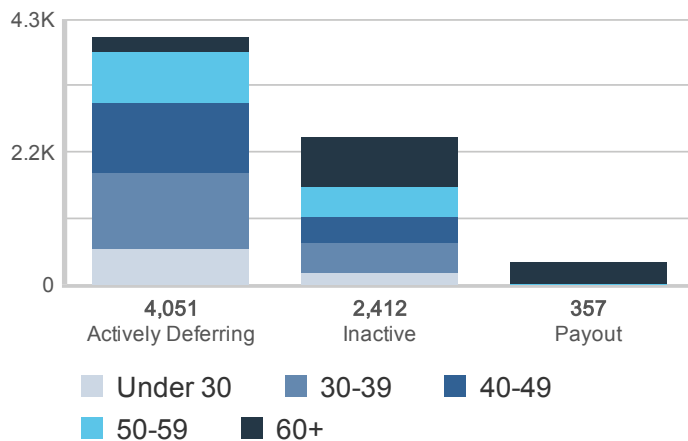


How many are participating?



ENROLLED PARTICIPANTS
(as of 03/31/2021)

6,820



NEW ENROLLMENTS
(Calendar year to date)

80

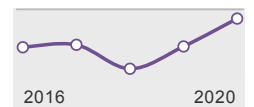
How are they saving & investing?



WHAT YOUR PARTICIPANTS ARE
CONTRIBUTING
(as of 03/31/2021)

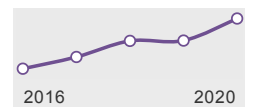
AVERAGE ACCOUNT BALANCE

\$47,862



AVERAGE CONTRIBUTION

\$257



How many participants are prepared for retirement



Online engagement

(as of 03/31/2021)

TOTAL ENROLLED
PARTICIPANTS

6,820

ENROLLED PARTICIPANTS WITH AN
ONLINE ACCOUNT

3,628



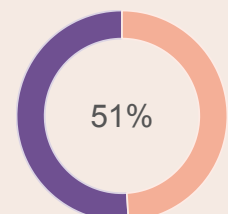
Retirement readiness

(as of 03/31/2021)

PARTICIPANTS WITH A
RETIREMENT GOAL

2,293

PARTICIPANTS 'ON TRACK' FOR
RETIREMENT



PARTICIPANT DEMOGRAPHICS

How participants are engaged in the plan



ENROLLED PARTICIPANTS ¹
(as of 03/31/2021)

6,820



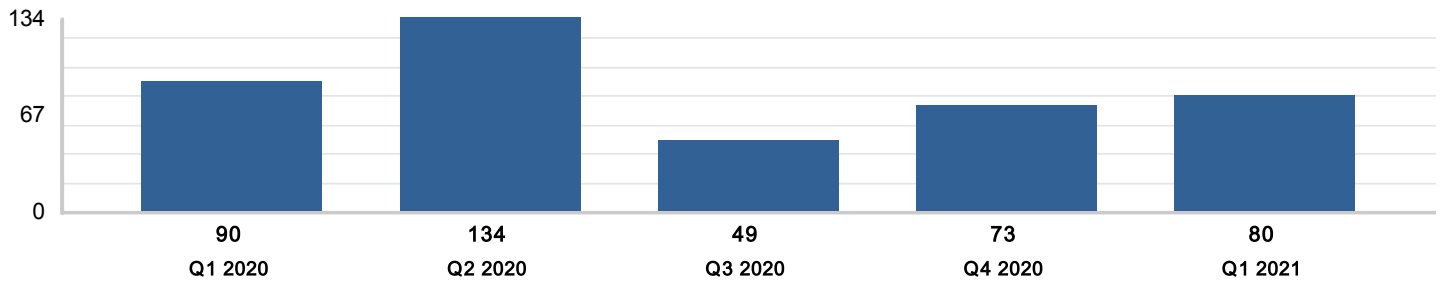
NEW ENROLLMENTS ²
(Calendar year to date)

80

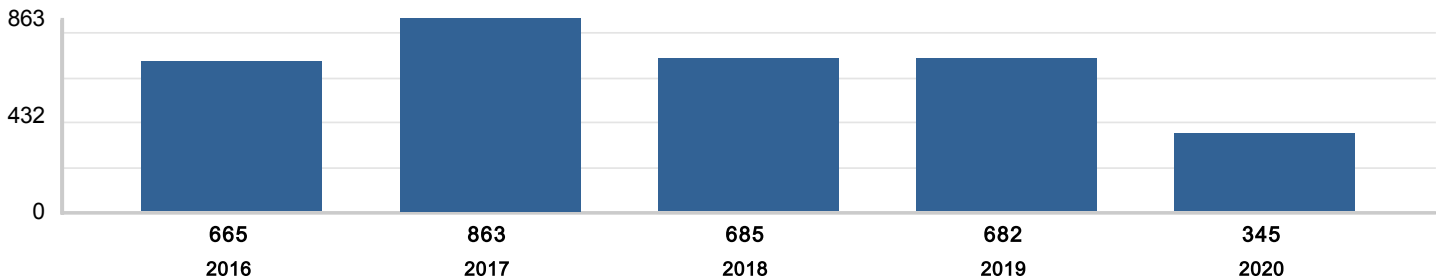
ONLINE ENROLLMENTS ³
(Calendar year to date)

21 out of 80

ENROLLMENT TRENDS (BY QUARTER) ⁴



ENROLLMENT TRENDS (BY YEAR) ⁴



¹ Total number of enrolled participants in this plan.

² Participants who open and close their account within the calendar year, will not be counted in year-to-date enrollment numbers.

³ The number of online enrollments out of new enrollments.

⁴ Total number of participants enrolled by quarter or by year.

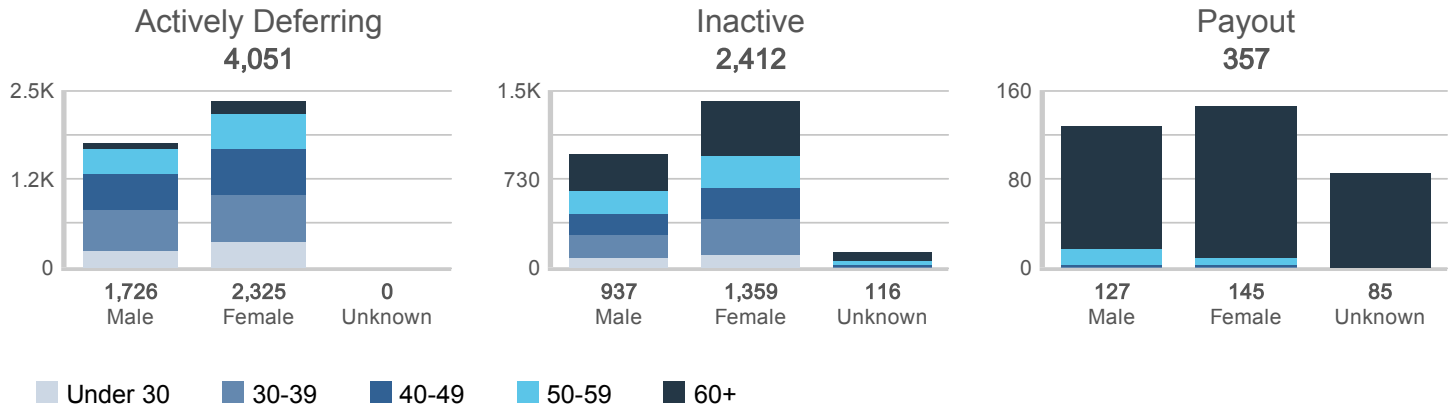
PARTICIPANT DEMOGRAPHICS

How participants are engaged in the plan



Enrolled participant data⁵

(as of 03/31/2021)



Actively Deferring 4,051

Inactive 2,412

Payout 357

	Male	Female	Unknown	Male	Female	Unknown	Male	Female	Unknown
Under 30	242	352	0	80	113	1	0	0	0
30 - 39	549	668	0	187	285	1	1	2	0
40 - 49	529	637	0	173	257	17	1	0	0
50 - 59	332	512	0	185	270	28	14	6	0
60+	74	156	0	312	434	69	111	137	85

⁵ Actively deferring - Participants with a balance, a contribution in the past 30 days and a status of employed.

Inactive - Participants with a balance, no contribution in the past 30 days and no status of payout.

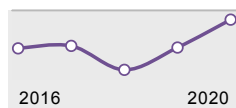
Payout - Participants with a balance and a status of payout.

CONTRIBUTIONS & INVESTMENTS

What your participants are contributing

AVERAGE ACCOUNT¹
BALANCE
(as of 03/31/2021)

\$47,862



AVERAGE ACCOUNT BALANCE BY YEAR

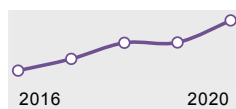


YOUR PLAN
\$47,862



AVERAGE CONTRIBUTION¹
PER PAY
(as of 03/31/2021)

\$257



AVERAGE CONTRIBUTION BY YEAR



YOUR PLAN
\$257



Balances & contributions by age & gender

(as of 03/31/2021)

Average account balance

	Male	Female	Unknown
Under 30	\$6,237	\$2,983	\$702
30 - 39	\$12,512	\$7,795	\$16
40 - 49	\$47,537	\$21,435	\$30,520
50 - 59	\$90,473	\$63,096	\$49,860
60+	\$142,433	\$98,490	\$76,056

Average annualized contributions

	Male	Female	Unknown
Under 30	\$2,505	\$1,208	\$0
30 - 39	\$3,280	\$2,262	\$0
40 - 49	\$5,201	\$1,928	\$104
50 - 59	\$14,836	\$6,396	\$50
60+	\$24,482	\$12,668	\$52

¹A peer group consists of NRS plans with similar assets. This peer group comparison includes cases with \$100 million - \$1 billion.

CONTRIBUTION & INVESTMENTS

What your participants are contributing

7% PARTICIPANTS WITH INCREASED CONTRIBUTIONS
(Calendar year to date)

4% PARTICIPANTS WITH AUTOMATIC CONTRIBUTION INCREASE
(Calendar year to date)

2021 IRS limits

Regular Limit \$19,500

50+ Catch Up \$6,500

3-Year Catch Up \$19,500

How your participants are invested

ASSET ALLOCATION ¹ (as of 03/31/2021)

NUMBER OF ASSET CLASSES

1	15.4%
2	6.4%
3	4.8%
4	3.5%
5+	69.9%



ASSET DIVERSIFICATION ² (as of 03/31/2021)

AVG. # ASSET CLASSES

4.5

PEER GROUP

4.5

RECOMMENDED

5



ProAccount

(as of 03/31/2021)

TOTAL PROACCOUNT BALANCE

\$29,238,444

PARTICIPANTS WITH PROACCOUNT

698

out of 6,820 total enrolled participants

AVG ACCOUNT BALANCE WITH PROACCOUNT

\$41,889

¹ Percentage of participants by number of investment classes.

² Average number of asset classes - Average number of asset classes in which participants are invested.

Peer group - Average number of asset classes in which this peer group (cases with \$100 million - \$1 billion) is invested.

Recommended number of asset classes - The number of asset classes in which a participant should be invested for ideal diversification.

RETIREMENT READINESS

How many participants are prepared for retirement



Online engagement

(as of 03/31/2021)

TOTAL ENROLLED PARTICIPANTS

6,820

ENROLLED PARTICIPANTS WITH AN ONLINE ACCOUNT

3,628



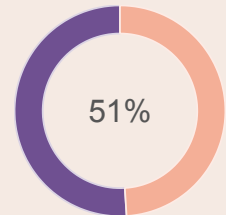
Retirement readiness

(as of 03/31/2021)

PARTICIPANTS WITH A RETIREMENT GOAL ¹

2,293

PARTICIPANTS 'ON TRACK' FOR RETIREMENT ²

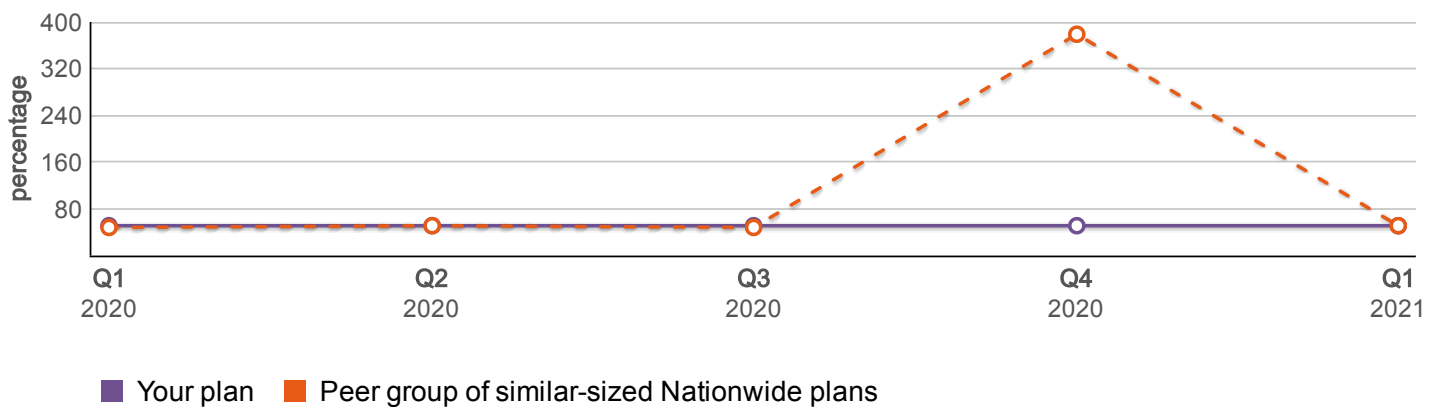


Participants who actively review their online account and use their retirement outlook tools are 4 times more likely to take action and save more for retirement.



Peer comparison

Retirement readiness peer comparison



NRM-17390AO

¹ Participants with a retirement goal from My Interactive Retirement Planner®.

² Participants with a retirement goal from My Interactive Retirement Planner® and a retirement readiness score of "on track" (.915 or higher).



Asset class totals

Asset class	2019	2020	2021 YTD	% of total
Mid cap	\$16,132,398.74	\$18,258,901.71	\$19,350,810.92	5.8%
Large cap	\$113,464,259.09	\$137,887,387.01	\$140,022,961.36	42.1%
Bonds	\$12,609,798.74	\$17,653,644.57	\$16,876,663.83	5.1%
Specialty	\$6,693,393.11	\$5,472,955.69	\$5,584,500.40	1.7%
Loan	\$6,183,451.80	\$6,337,407.94	\$6,032,041.89	1.8%
Asset allocation	\$34,918,717.27	\$41,257,465.58	\$43,467,830.16	13.1%
International	\$16,510,275.24	\$18,402,159.97	\$19,382,243.89	5.8%
Small cap	\$12,363,029.67	\$12,107,622.12	\$13,115,876.62	3.9%
Fixed assets and cash	\$65,156,632.48	\$68,836,539.66	\$68,621,070.23	20.6%
Total	\$284,031,956.14	\$326,214,084.25	\$332,453,999.30	100%

 Total contributions by asset class

Asset class	2019	2020	2021 YTD	% of total
Mid cap	\$741,158.85	\$885,558.50	\$185,533.47	4.8%
Large cap	\$3,340,342.18	\$3,865,117.32	\$848,469.52	22.1%
Balanced	\$28,914.38	\$0.00	\$0.00	0.0%
Bonds	\$665,120.03	\$759,183.13	\$201,199.74	5.2%
Specialty	\$319,313.54	\$522,372.41	\$80,981.77	2.1%
Asset allocation	\$5,356,843.53	\$5,702,886.76	\$1,332,403.06	34.6%
International	\$1,131,789.27	\$1,195,792.06	\$270,029.55	7.0%
Small cap	\$747,855.28	\$686,629.41	\$116,574.80	3.0%
Fixed assets and cash	\$2,076,823.16	\$2,563,173.96	\$812,160.55	21.1%
Total	\$14,408,160.22	\$16,180,713.55	\$3,847,352.46	100%

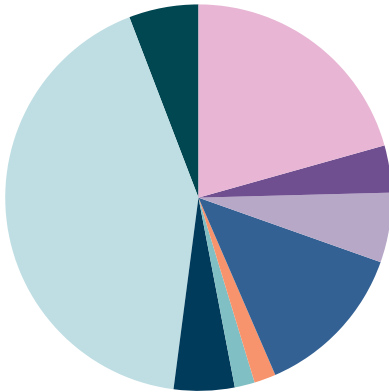
ASSET & FUND DETAILS

2021



Asset allocation

(as of 03/31/2021)



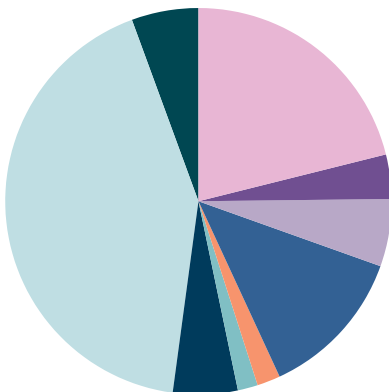
ASSET CLASS	YOUR PLAN	PEER GROUP	DIFFERENCE
Mid cap	5.8%	5.8%	0.0%
Large cap	42.1%	19.6%	22.6% ●
Balanced	0.0%	1.6%	-1.6% ●
Bonds	5.1%	4.0%	1.1% ●
Short term	0.0%	2.1%	0.0%
SDO	0.0%	0.1%	0.0%
Specialty	1.7%	0.6%	1.1% ●
Loan	1.8%	0.0%	1.8% ●
Asset allocation	13.1%	11.5%	1.5% ●
International	5.8%	5.6%	0.3% ●
Small cap	3.9%	3.2%	0.7% ●
Fixed assets and cash	20.6%	45.8%	-25.2% ●

2020



Asset allocation

(as of 12/31/2020)



ASSET CLASS	YOUR PLAN	PEER GROUP	DIFFERENCE
Mid cap	5.6%	5.5%	0.1% ●
Large cap	42.3%	19.7%	22.6% ●
Balanced	0.0%	1.6%	-1.6% ●
Bonds	5.4%	4.2%	1.2% ●
Short term	0.0%	2.1%	0.0%
SDO	0.0%	0.1%	0.0%
Specialty	1.7%	0.6%	1.1% ●
Loan	1.9%	0.0%	1.9% ●
Asset allocation	12.6%	12.9%	-0.3% ●
International	5.6%	5.6%	0.1% ●
Small cap	3.7%	3.2%	0.6% ●
Fixed assets and cash	21.1%	44.6%	-23.5% ●

BALANCE DETAILS



Total account balance

(as of 03/31/2021)

Money source	Current value
Participant assets	\$332,453,999.30
Salary Reduction	\$314,360,425.89
Rollover (Pre-Tax)	\$9,488,131.94
Rollover 457	\$1,769,985.82
Roth Contribution	\$637,056.13
Roth Rollover 457	\$12,748.73
Salary Reduction IRR	\$153,608.90
Loan balance	\$6,032,041.89
Total plan assets	\$332,453,999.30

BALANCE DETAILS



Loan Details

(as of 03/31/2021)

Loan type	Number of loans	Principal value
Active loans		
General purpose loan	777	\$4,824,431.02
Primary residence loan	40	\$437,007.24
Defaulted loans*		
General purpose loan	140	\$766,418.56
Primary residence loan	2	\$4,185.07
Total	959	\$6,032,041.89

* Default amounts are included in Beginning and Ending Balance



Contributions and transfers/rollovers-in

(as of 03/31/2021)

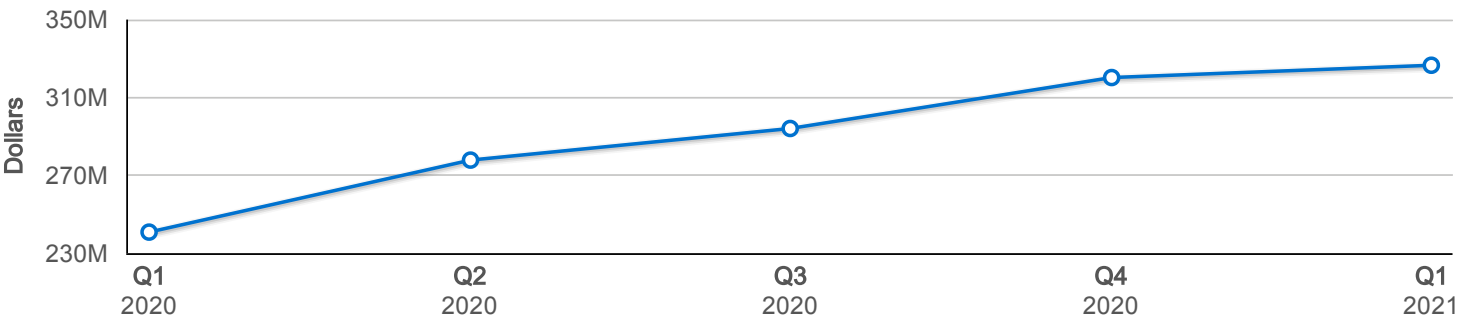
Type	Year to date
Contributions	\$3,787,318.03
Transfers/Rollovers-In	\$60,034.43
Total	\$3,847,352.46



Balance activity by quarter

Change in balance from last quarter

▲ 2.0%
FROM LAST QUARTER

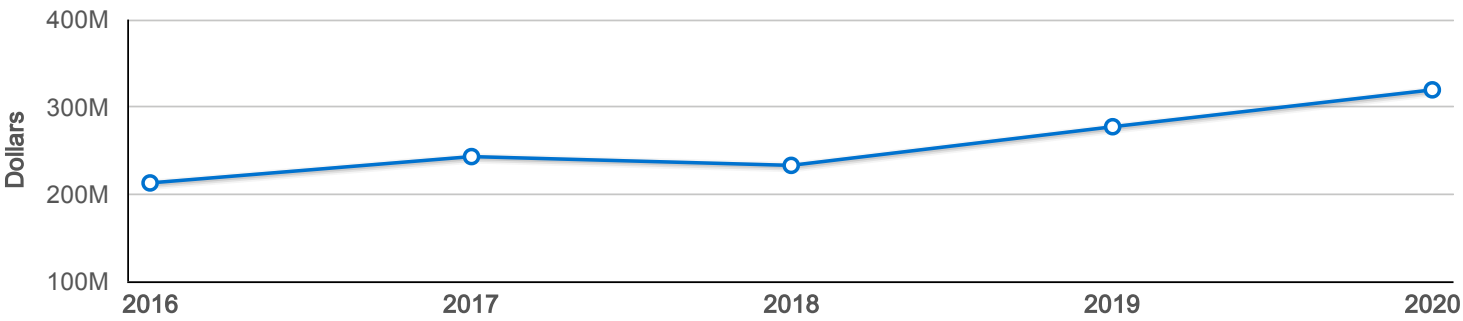




Balance activity by year

Change in balance from last year

▲ 15.1%
FROM LAST YEAR



	2016	2017	2018	2019	2020
Total balance	\$213,331,316.00	\$243,210,743.20	\$232,681,219.20	\$277,848,504.34	\$319,876,676.31

Top opportunities to improve plan health

- ✓ **Encourage enrollment**
Are you happy with your participation rate? Schedule an enrollment workshop today
- ✓ **Suggest online account usage**
Those who engage in their online account are 4x more likely to save more for retirement
- ✓ **Propose contribution increases**
Anything can help. Talk with your participants about the benefits of saving now for a better tomorrow
- ✓ **Discuss the benefits of Nationwide ProAccount**
How participants are invested can play a big role in their retirement health

Additional opportunities

How participants are engaged in the plan

- ✓ **Are your participants in the correct status based on their age?**
Check in with participants who may not be in the correct status.

What your participants are contributing

- ✓ **Starting to save early is one of the best ways to prepare for retirement.**
Contact your Nationwide representative to schedule a workshop with your participants under the age of 30 to help them understand the benefits of saving more now.
- ✓ **Are your female participants actively contributing?**
Host a workshop for women eligible and enrolled in your plan. Nationwide's Women & Investing tools can help.
- ✓ **Incremental increases can go a long way.**
Let your participants know how having an automatic annual contribution increase can help them reach their retirement goal.
- ✓ **Work with your Nationwide Retirement Specialist to help manage your loans.**
- ✓ **Are those closer to retirement aware of catch-up contributions?**
Let your participants know that catch-up contributions may help them reach their goal.

How your participants are invested

- ✓ **Are participants diversified enough?**
Call your Nationwide retirement specialist and discuss your participants' asset diversification.

How many participants are prepared for retirement

- ✓ **How many participants are getting close to retirement?**
Talk with your participants about which payout strategies may benefit them the most.

Explicit Asset Fee Summary

EXPLICIT ASSET FEE SUMMARY

	Plan Sponsor Fee Amount	NRS Fee Amount
January	\$24,296.97	\$27,000.28
February	\$22,221.75	\$24,694.47
March	\$24,925.91	\$27,697.49
1Q2021 Revenue Total	\$71,444.63	\$79,392.24

Fee Normalization Calculation

FEE NORMALIZATION CALCULATION

Fund Name	Fund	Ticker	01/31/2021 Account Value	02/28/2021 Account Value	03/31/2021 Account Value	Jan-2021 Annual Fund Srcv Fee Rate	Feb-2021 Annual Fund Srcv Fee Rate	Mar-2021 Annual Fund Srcv Fee Rate	1Q2021 Fund Service Fee Payment Amount
Alger Spectra Fund - Class Y	NTVB24	ASPYX	\$64,471,366	\$64,828,816	\$64,020,201	0.000%	0.000%	0.000%	\$0
BlackRock EAFE Equity Index Fund T	NTV194	BLKAX	\$4,889,461	\$4,981,012	\$4,038,982	0.000%	0.000%	0.000%	\$0
BlackRock Equity Index Fund M	NTV195	BLKBX	\$55,215,798	\$55,910,334	\$58,147,647	0.000%	0.000%	0.000%	\$0
BlackRock Mid Capitalization Equity Index Fund M	NTV196	BLKCX	\$9,849,295	\$10,247,189	\$10,845,716	0.000%	0.000%	0.000%	\$0
BlackRock Russell 2000 Index Fund M	NTV197	BLKDX	\$3,819,643	\$4,015,626	\$4,630,259	0.000%	0.000%	0.000%	\$0
BlackRock US Debt Index Fund - W	NTV198	BLKEX	\$8,290,806	\$8,115,359	\$8,104,000	0.000%	0.000%	0.000%	\$0
Columbia Dividend Income Fund - Class Y	NTV264	CDDYX	\$16,215,790	\$16,941,347	\$17,855,114	0.000%	0.000%	0.000%	\$0
Fidelity Advisor Real Estate Income Fund - Institutional Class	NTV265	FRIRX	\$1,989,521	\$2,111,898	\$2,165,001	0.250%	0.250%	0.250%	\$1,287
Franklin Utilities Fund - Class R6	NTV266	FUFRX	\$3,232,083	\$3,056,298	\$3,419,499	0.000%	0.000%	0.000%	\$0
Fresno County Stable Value Fund	NTG004		\$69,414,350	\$69,905,721	\$68,621,070	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2015 Trust	NTV354		\$4,495,361	\$4,380,332	\$4,428,476	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2020 Trust	NTVA03		\$182,952	\$185,014	\$187,309	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2025 Trust	NTV355		\$12,599,824	\$12,952,094	\$13,113,204	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2030 Trust	NTVA04		\$349,461	\$359,224	\$569,506	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2035 Trust	NTV356		\$8,816,844	\$8,814,689	\$9,217,571	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2040 Trust	NTVA05		\$30,740	\$32,578	\$140,341	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2045 Trust	NTV357		\$8,746,445	\$8,981,100	\$9,085,925	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2050 Trust	NTVA06		\$79,956	\$90,615	\$129,048	0.000%	0.000%	0.000%	\$0
Great-West Lifetime 2055 Trust	NTV358		\$6,167,945	\$6,411,609	\$6,596,450	0.000%	0.000%	0.000%	\$0
Invesco Developing Markets Fund - Class R6	NTV08X	ODVIX	\$3,289,403	\$3,303,477	\$3,474,471	0.000%	0.000%	0.000%	\$0
Janus Henderson Small Cap Value Fund - Class N	NTV269	JDSNX	\$1,465,343	\$1,540,352	\$1,073,338	0.000%	0.000%	0.000%	\$0
Loan	LXM001		\$5,276,815	\$5,279,896	\$5,261,438	0.000%	0.000%	0.000%	\$0
Metropolitan West Funds - Total Return Bond Fund - Plan Class	NTV381	MWTSX	\$7,526,907	\$7,477,760	\$7,091,889	0.000%	0.000%	0.000%	\$0
Nicholas Limited Edition Fund - Institutional Class	NTV268	NCLEX	\$6,999,272	\$7,251,881	\$7,412,280	0.000%	0.000%	0.000%	\$0
T. Rowe Price Mid-Cap Growth Fund - I Class	NTV981	RPTIX	\$8,043,432	\$8,392,231	\$8,505,094	0.000%	0.000%	0.000%	\$0
T. Rowe Price Overseas Stock Fund - I Class	NTV509	TROIX	\$10,254,160	\$10,602,281	\$11,868,791	0.000%	0.000%	0.000%	\$0
Vanguard Total International Bond Index Fund - Admiral	NTV668	VTABX	\$1,712,039	\$1,691,166	\$1,680,775	0.000%	0.000%	0.000%	\$0
Total			\$323,425,010	\$327,859,897	\$331,683,396				\$1,287

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YOUR DEDICATED SERVICE TEAM

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