

HP 401(k) Plan investment options

The HP 401(k) Plan investment options are designed to help simplify your investment decisions while providing flexibility.

The investment options are grouped into several different categories, or “tiers,” offering you a number of ways to create a diversified investment portfolio that’s right for you.

| Tier 1 Complete Portfolios | Tier 2 Core Active Funds | Tier 3 Core Passive Funds | Tier 4 Extended Funds | Tier 5 Mutual Fund Brokerage Window |
|---|---|--|---|--|
| Description | | | | |
| <p>Birth Date Funds are ready-mixed portfolios designed for investors in a similar age group. For example, if you were born around 1960 you might choose the Birth Date Fund: 1960 Fund.</p> <p>This tier also includes the Conservative Fund, which may be appropriate for older investors with a low tolerance for risk.</p> | <p>The core funds in this tier are from major asset classes (equities/stocks, bonds and short-term investments) that you can use if you’re looking to build your own portfolio. These funds have underlying managers who seek to outperform market indices.</p> | <p>This tier includes additional core funds that you can use to create or round out your portfolio alongside the Tier 2 options.</p> <p>These funds are intended to track the performance of market indices.</p> | <p>This tier includes funds in the secondary asset classes and may be right for you if you’re looking to diversify beyond the core asset classes in Tiers 2 and 3.</p> <p>This tier includes the HP Stock Fund as a single stock investment option.</p> | <p>This tier allows you to go outside the HP fund lineup and invest money in any brand-name mutual fund offered through Fidelity’s self-directed brokerage window.</p> |
| List of funds | | | | |
| <p>Conservative Fund</p> <ul style="list-style-type: none"> • Birth Date Fund: 1945 • Birth Date Fund: 1950 • Birth Date Fund: 1955 • Birth Date Fund: 1960 • Birth Date Fund: 1965 • Birth Date Fund: 1970 • Birth Date Fund: 1975 • Birth Date Fund: 1980 • Birth Date Fund: 1985 • Birth Date Fund: 1990 • Birth Date Fund: 1995 • Birth Date Fund: 2000 | <ul style="list-style-type: none"> • Money Market Fund • Short Term Bond Fund • Core Bond Fund • US Large Cap Equity Fund • US Small/Mid-Cap Equity Fund • International Equity Fund | <ul style="list-style-type: none"> • Core Bond Index Fund • US Large Cap Equity Index Fund • US Small/Mid-Cap Equity Index Fund • International Equity Index Fund | <ul style="list-style-type: none"> • Real Return Bond Fund • High Yield Bond Fund • Emerging Markets Equity Fund • Global Real Estate Fund • HP Stock Fund | <p>Thousands of mutual funds offered through Fidelity’s self-directed brokerage window</p> |