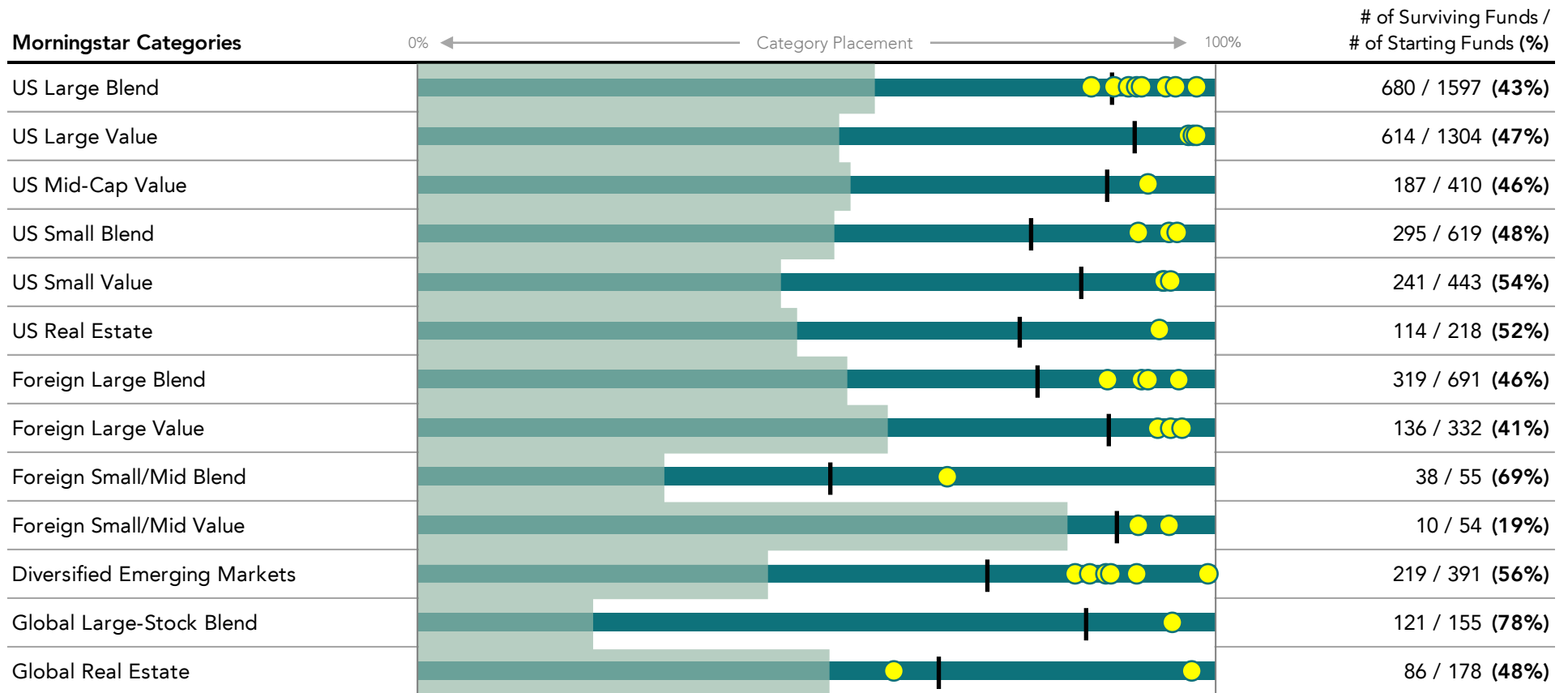

Evaluating Dimensional Across Strategies

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Evaluating Dimensional Across Strategies

Dimensional equity fund performance relative to Morningstar peers, 15-year period ending March 31, 2024

■ Funds No Longer in Existence ■ Surviving Funds | Average Index Fund Placement¹ ● Dimensional Funds in Category



1. Average Index Fund Placement is provided where index fund(s) with a Morningstar 15-Year Total Return Absolute Category Rank exist in the category as of the period ending date. Dimensional placement is the Morningstar 15-Year Total Return Absolute Category Rank sourced from Morningstar. Number of funds starting the period is the number of share classes, within the respective Morningstar Category, with return histories as of the start of the 15-year period. The Morningstar category data is provided at the individual fund share class level. Multiple share classes of a fund typically have a common portfolio but impose different expense structures. The Average Index Fund Placement is the average, as determined by Dimensional, of the Morningstar 15-Year Total Return Absolute Category Rank for index funds within the respective Morningstar category. All funds are US-domiciled. Funds may have experienced negative performance over the time period. Past performance is no guarantee of future results. Visit dimensional.com for standardized performance information for Dimensional's funds. See "Relative Performance for Standardized Periods" in the appendix for further information.

Relative Performance for Standardized Periods

Equity funds with more than 15 years of history as of March 31, 2024

| Fund Name | Ticker | Morningstar Category (US Fund) | Prior Year | | | Prior 5 Years | | | Prior 10 Years | | | Prior 15 Years | | |
|--|--------|-----------------------------------|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Dimensional Placement/ Funds at Start ¹ | Number of Ranked Investments ² | Average Index Fund Placement ³ | Dimensional Placement/ Funds at Start ¹ | Number of Ranked Investments ² | Average Index Fund Placement ³ | Dimensional Placement/ Funds at Start ¹ | Number of Ranked Investments ² | Average Index Fund Placement ³ | Dimensional Placement/ Funds at Start ¹ | Number of Ranked Investments ² | Average Index Fund Placement ³ |
| Emerging Markets Core Equity Portfolio (I) | DFCEX | Diversified Emerging Markets | 280/882 | 817 | 405 | 147/911 | 657 | 339 | 96/778 | 425 | 218 | 39/391 | 219 | 112 |
| Emerging Markets Portfolio (I) | DFEMX | Diversified Emerging Markets | 357/882 | 817 | 405 | 206/911 | 657 | 339 | 135/778 | 425 | 218 | 69/391 | 219 | 112 |
| Emerging Markets Portfolio (II) | DFETX | Diversified Emerging Markets | 363/882 | 817 | 405 | 198/911 | 657 | 339 | 124/778 | 425 | 218 | 62/391 | 219 | 112 |
| Emerging Markets Small Cap Portfolio (I) | DEMSX | Diversified Emerging Markets | 292/882 | 817 | 405 | 94/911 | 657 | 339 | 36/778 | 425 | 218 | 4/391 | 219 | 112 |
| Emerging Markets Social Core Equity Portfolio | DFESX | Diversified Emerging Markets | 342/882 | 817 | 405 | 207/911 | 657 | 339 | 126/778 | 425 | 218 | 51/391 | 219 | 112 |
| Emerging Markets Value Portfolio (I) | DFEVX | Diversified Emerging Markets | 154/882 | 817 | 405 | 154/911 | 657 | 339 | 103/778 | 425 | 218 | 54/391 | 219 | 112 |
| Continental Small Company Portfolio (I) | DFCSX | Europe Stock | 80/90 | 86 | 42 | 34/115 | 84 | 47 | 8/106 | 52 | 26 | 5/89 | 38 | 23 |
| International Core Equity Portfolio (I) | DFIEX | Foreign Large Blend | 280/786 | 748 | 301 | 168/818 | 646 | 322 | 101/692 | 425 | 196 | 31/691 | 319 | 154 |
| International Sustainability Core 1 Portfolio | DFSPX | Foreign Large Blend | 211/786 | 748 | 301 | 164/818 | 646 | 322 | 98/692 | 425 | 196 | 58/691 | 319 | 154 |
| Large Cap International Portfolio (I) | DFALX | Foreign Large Blend | 174/786 | 748 | 301 | 127/818 | 646 | 322 | 93/692 | 425 | 196 | 93/691 | 319 | 154 |
| World ex US Core Equity 2 ETF ⁵ | DFAX | Foreign Large Blend | 320/786 | 748 | 301 | 334/818 | 646 | 322 | 165/692 | 425 | 196 | 64/691 | 319 | 154 |
| International Value ETF ⁵ | DFIV | Foreign Large Value | 61/383 | 372 | 182 | 54/406 | 316 | 182 | 43/378 | 205 | 103 | 24/332 | 136 | 45 |
| International Value Portfolio (I) | DFIVX | Foreign Large Value | 57/383 | 372 | 182 | 44/406 | 316 | 182 | 34/378 | 205 | 103 | 19/332 | 136 | 45 |
| International Value Portfolio (III) | DFVIX | Foreign Large Value | 53/383 | 372 | 182 | 34/406 | 316 | 182 | 25/378 | 205 | 103 | 14/332 | 136 | 45 |
| International Small Company Portfolio (I) | DFISX | Foreign Small/Mid Blend | 56/104 | 103 | 59 | 26/123 | 84 | 56 | 20/77 | 49 | 38 | 19/55 | 38 | 27 |
| International Small Cap Value Portfolio (I) | DISVX | Foreign Small/Mid Value | 15/47 | 47 | 32 | 17/58 | 40 | 32 | 14/50 | 22 | 16 | 4/54 | 10 | 8 |
| International Vector Equity Portfolio | DFVQX | Foreign Small/Mid Value | 23/47 | 47 | 32 | 18/58 | 40 | 32 | 9/50 | 22 | 16 | 6/54 | 10 | 8 |
| Global Equity Portfolio (I) | DGEIX | Global Large-Stock Blend | 115/371 | 354 | 136 | 56/337 | 300 | 113 | 37/237 | 202 | 40 | 9/155 | 121 | 26 |
| Global Real Estate Securities Portfolio | DFGEX | Global Real Estate | 144/201 | 192 | 118 | 60/235 | 179 | 148 | 14/205 | 119 | 97 | 6/178 | 86 | 62 |
| International Real Estate Securities Portfolio (I) | DFITX | Global Real Estate | 176/201 | 192 | 118 | 157/235 | 179 | 148 | 107/205 | 119 | 97 | 72/178 | 86 | 62 |
| Japanese Small Company Portfolio (I) | DFJSX | Japan Stock | 25/37 | 37 | 12 | 27/55 | 32 | 11 | 17/42 | 23 | 10 | 8/55 | 14 | 9 |
| Asia Pacific Small Company Portfolio (I) | DFRSX | Miscellaneous Region | —/— | — | — | —/— | — | — | —/— | — | — | —/— | — | — |
| United Kingdom Small Company Portfolio (I) | DFUKX | Miscellaneous Region | —/— | — | — | —/— | — | — | —/— | — | — | —/— | — | — |
| Enhanced US Large Co. Portfolio (I) | DFELX | US Large Blend | 556/1,492 | 1,422 | 703 | 685/1,435 | 1,179 | 495 | 299/1,438 | 888 | 276 | 147/1,597 | 680 | 206 |
| US Core Equity 1 Portfolio (I) | DFEOX | US Large Blend | 793/1,492 | 1,422 | 703 | 452/1,435 | 1,179 | 495 | 394/1,438 | 888 | 276 | 98/1,597 | 680 | 206 |
| US Core Equity 2 ETF ⁴ | DFAC | US Large Blend | 930/1,492 | 1,422 | 703 | 618/1,435 | 1,179 | 495 | 591/1,438 | 888 | 276 | 200/1,597 | 680 | 206 |
| US Core Equity 2 Portfolio (I) | DFQTX | US Large Blend | 901/1,492 | 1,422 | 703 | 494/1,435 | 1,179 | 495 | 556/1,438 | 888 | 276 | 170/1,597 | 680 | 206 |
| US Equity ETF ⁴ | DFUS | US Large Blend | 458/1,492 | 1,422 | 703 | 268/1,435 | 1,179 | 495 | 192/1,438 | 888 | 276 | 155/1,597 | 680 | 206 |
| US Large Company Portfolio | DFUSX | US Large Blend | 498/1,492 | 1,422 | 703 | 251/1,435 | 1,179 | 495 | 78/1,438 | 888 | 276 | 79/1,597 | 680 | 206 |
| US Social Core Equity 2 Portfolio | DFUEX | US Large Blend | 519/1,492 | 1,422 | 703 | 594/1,435 | 1,179 | 495 | 632/1,438 | 888 | 276 | 247/1,597 | 680 | 206 |
| US Sustainability Core 1 Portfolio | DFSIX | US Large Blend | 359/1,492 | 1,422 | 703 | 159/1,435 | 1,179 | 495 | 234/1,438 | 888 | 276 | 36/1,597 | 680 | 206 |
| US Large Cap Value Portfolio (I) | DFLVX | US Large Value | 393/1,248 | 1,204 | 642 | 495/1,301 | 1,058 | 540 | 311/1,249 | 816 | 287 | 41/1,304 | 614 | 133 |
| US Large Cap Value Portfolio (III) | DFUVX | US Large Value | 382/1,248 | 1,204 | 642 | 462/1,301 | 1,058 | 540 | 268/1,249 | 816 | 287 | 34/1,304 | 614 | 133 |
| US Marketwide Value ETF ⁶ | DFUV | US Large Value | 342/1,248 | 1,204 | 642 | 516/1,301 | 1,058 | 540 | 277/1,249 | 816 | 287 | 30/1,304 | 614 | 133 |
| US Vector Equity Portfolio (I) | DFVEX | US Mid-Cap Value | 92/409 | 399 | 216 | 61/452 | 363 | 173 | 52/416 | 281 | 106 | 35/410 | 187 | 56 |
| Real Estate Securities Portfolio (I) | DFREX | US Real Estate | 149/256 | 250 | 113 | 101/264 | 217 | 143 | 36/253 | 160 | 104 | 16/218 | 114 | 54 |
| US Micro Cap Portfolio (I) | DFSCX | US Small Blend | 297/641 | 610 | 347 | 148/720 | 552 | 336 | 107/644 | 384 | 194 | 36/619 | 295 | 143 |
| US Small Cap ETF ⁴ | DFAS | US Small Blend | 288/641 | 610 | 347 | 139/720 | 552 | 336 | 117/644 | 384 | 194 | 59/619 | 295 | 143 |
| US Small Cap Portfolio (I) | DFSTX | US Small Blend | 267/641 | 610 | 347 | 116/720 | 552 | 336 | 94/644 | 384 | 194 | 29/619 | 295 | 143 |
| US Small Cap Value Portfolio (I) | DFSVX | US Small Value | 76/496 | 489 | 254 | 45/521 | 426 | 221 | 65/475 | 335 | 150 | 29/443 | 241 | 75 |
| US Targeted Value ETF ⁴ | DFAT | US Small Value | 87/496 | 489 | 254 | 65/521 | 426 | 221 | 59/475 | 335 | 150 | 25/443 | 241 | 75 |
| US Targeted Value Portfolio (I) | DFVX | US Small Value | 99/496 | 489 | 254 | 41/521 | 426 | 221 | 50/475 | 335 | 150 | 28/443 | 241 | 75 |

Equity funds included on the “Evaluating Dimensional Cross Strategies” slide are shown here in bold.

1. Dimensional Placement is the Morningstar 1-, 5-, 10-, or 15-Year Total Return Absolute Category Rank sourced from Morningstar. Number of funds starting the period is the number of share classes, within the respective Morningstar Category, with return histories as of the start of the 1-, 5-, 10-, or 15-year period.
2. Number of Ranked Investments is sourced from Morningstar for each category and is the number of share classes that were ranked as of the end of the 1-, 5-, 10-, or 15-year period.
3. Average Index Fund Placement is provided where index fund(s) with a Morningstar 1-, 5-, 10-, or 15-Year Total Return Absolute Category Rank exist in the category at the end of the period. The Average Index Fund Placement is the average, as determined by Dimensional, of the Morningstar 1-, 5-, 10-, or 15-Year Total Return Absolute Category Rank for index funds within the respective Morningstar category at the end of the period.
4. Prior to listing on June 14, 2021, the ETF operated as a mutual fund. The NAVs of the predecessor mutual fund are used for both NAV and market price performance from inception to listing.
5. Prior to listing on September 13, 2021, the ETF operated as a mutual fund. The NAVs of the predecessor mutual fund are used for both NAV and market price performance from inception to listing.
6. Prior to listing on May 9, 2022, the ETF operated as a mutual fund. The NAVs of the predecessor mutual fund are used for both NAV and market price performance from inception to listing.

The Morningstar category data is provided at the individual fund share class level. Multiple share classes of a fund typically have a common portfolio but impose different expense structures. The table includes US-domiciled Dimensional equity funds ranked by Morningstar and available on or before 15 years prior to the end of the period. Morningstar uses NAV performance data for ETFs. **Funds may have experienced negative performance over the time period. Past performance is no guarantee of future results. Visit dimensional.com for standardized performance information for Dimensional's funds.**