



2017 THOMSON REUTERS LIPPER FUND AWARDS

UNITED STATES WINNER LIST

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	Vanguard Group, Inc.
Equity	Small Company	PRIMECAP Management Company
Fixed Income	Large Company	Morgan Stanley Investment Management, Inc.
Fixed Income	Small Company	Westcore Funds
Mixed Assets	Large Company	TIAA-CREF
Mixed Assets	Small Company	Thrivent Mutual Funds
Overall	Large Company	TIAA-CREF
Overall	Small Company	Thrivent Mutual Funds

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Absolute Return Funds	3 Years	Columbia Absolute Return Currency & Income Fund, I	Columbia Funds	50
Alternative Credit Focus Funds	3 Years	Guggenheim Macro Opportunities Fund, Institutional	Guggenheim Investments	46
Alternative Equity Market Neutral Funds	3 Years	Zacks Market Neutral Fund, Investor	Zacks Investment Management, Inc.	20
Alternative Event Driven Funds	3 Years	SilverPepper Merger Arbitrage Fund, Institutional	SilverPepper, LLC	13
Alternative Global Macro Funds	3 Years	SEI Institutional Investments Trust Dynamic Asset Allocation Fund, A	SEI Group	71
Alternative Long/Short Equity Funds	3 Years	AQR Long-Short Equity Fund, I	AQR Capital Management, LLC	70
Alternative Managed Futures Funds	3 Years	Altegris Futures Evolution Strategy Fund, I	Altegris Advisors, LLC	28
Alternative Multi-Strategy Funds	3 Years	AQR Multi-Strategy Alternative Fund, I	AQR Capital Management, LLC	30
California Intermediate Municipal Debt Funds	3 Years	Franklin California Intermediate-Term Tax-Free Income Fund, Advisor	Franklin Templeton Investments	15
California Municipal Debt Funds	3 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	34
China Region Funds	3 Years	Neuberger Berman Greater China Equity Fund, Institutional	Neuberger Berman Management, LLC	21
Commodities General Funds	3 Years	LoCorr Long/Short Commodities Strategy Fund, I	LoCorr Fund Management, LLC	31
Convertible Securities Funds	3 Years	MainStay Convertible Fund, I	MainStay Funds	17
Core Bond Funds	3 Years	Western Asset Core Bond Fund, IS	Legg Mason	125

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Core Plus Bond Funds	3 Years	Morgan Stanley Institutional Core Plus Fixed Income Portfolio, I	Morgan Stanley Investment Management, Inc.	55
Corporate Debt A-Rated Funds	3 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	15
Corporate Debt BBB-Rated Funds	3 Years	Morgan Stanley Institutional Corporate Bond Portfolio, I	Morgan Stanley Investment Management, Inc.	63
Dedicated Short-Bias Funds	3 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	32
Emerging Markets Funds	3 Years	Matthews Emerging Asia Fund, Institutional	Matthews International Capital Management, LLC	180
Emerging Markets Hard Currency Debt Funds	3 Years	DuPont Capital Emerging Markets Debt Fund, I	DuPont Capital Management Corporation	61
Emerging Markets Local Currency Debt Funds	3 Years	Eaton Vance Emerging Markets Debt Opportunities Fund, R6	Eaton Vance Management	18
Energy MLP Funds	3 Years	Tortoise MLP & Pipeline Fund, Institutional	Tortoise Capital Advisors, LLC	18
Equity Income Funds	3 Years	Invesco Dividend Income Fund, R6	Invesco Funds	123
European Region Funds	3 Years	DFA Continental Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	22
Financial Services Funds	3 Years	RMB Mendon Financial Services Fund, A	RMB Capital Management	22
Flexible Income Funds	3 Years	Cohen & Steers Preferred Securities & Income Fund, I	Cohen & Steers Capital Management, Inc.	15
Flexible Portfolio Funds	3 Years	GuideStone Defensive Market Strategies Fund, Institutional	GuideStone Funds Trust	147
General & Insured Municipal Debt Funds	3 Years	Oppenheimer Rochester AMT-Free Municipal Fund, Y	OppenheimerFunds, Inc.	76
General Bond Funds	3 Years	PIMCO Long-Term Credit Fund, Institutional	PIMCO	21
General U.S. Government Funds	3 Years	Vanguard Long-Term Government Bond Index Fund, Institutional	Vanguard Group, Inc.	23
General U.S. Treasury Funds	3 Years	Vanguard Extended Duration Treasury Index Fund, Institutional Plus	Vanguard Group, Inc.	15
Global Equity Income Funds	3 Years	QS Global Dividend Fund, IS	Legg Mason	37
Global Income Funds	3 Years	PIMCO Global Bond Fund (US Dollar-Hedged), Institutional	PIMCO	47
Global Infrastructure Funds	3 Years	Lazard Global Listed Infrastructure Portfolio, Institutional	Lazard Asset Management, LLC	17
Global Large-Cap Core Funds	3 Years	Thrivent Large Cap Stock Fund, S	Thrivent Mutual Funds	15
Global Large-Cap Growth Funds	3 Years	John Hancock Fundamental Global Franchise Fund, NAV	John Hancock Group	20
Global Large-Cap Value Funds	3 Years	Eaton Vance Hexavest Global Equity Fund, I	Eaton Vance Management	14
Global Multi-Cap Core Funds	3 Years	SEI Institutional Managed Global Managed Volatility Fund, A	SEI Group	48
Global Multi-Cap Growth Funds	3 Years	Victory RS Global Fund, R	Victory Capital Management, Inc.	59
Global Multi-Cap Value Funds	3 Years	Fidelity Series Intrinsic Opportunistic Fund, F	Fidelity Management & Research Company	26
Global Natural Resources Funds	3 Years	T. Rowe Price New Era Fund	T. Rowe Price Associates, Inc.	29
Global Real Estate Funds	3 Years	DFA Global Real Estate Securities Portfolio	Dimensional Fund Advisors, LP	39
Global Small-/Mid-Cap Funds	3 Years	Morgan Stanley Institutional Global Discovery Portfolio, I	Morgan Stanley Investment Management, Inc.	32
GNMA Funds	3 Years	Vanguard GNMA Fund, Admiral	Wellington Management Company, LLP	17
Health/Biotechnology Funds	3 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	23
High Yield Funds	3 Years	Lord Abbett High Yield Fund, I	Lord Abbett & Company, LLC	153

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
High Yield Municipal Debt Funds	3 Years	Oppenheimer Rochester High Yield Municipal Fund, Y	OppenheimerFunds, Inc.	36
Industrials Funds	3 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	11
Inflation-Protected Bond Funds	3 Years	DFA LTIP Portfolio, Institutional	Dimensional Fund Advisors, LP	48
Intermediate Municipal Debt Funds	3 Years	Eaton Vance TABS 5-to-15 Year Laddered Municipal Bond Fund, I	Eaton Vance Management	61
Intermediate U.S. Government Funds	3 Years	Dupree Intermediate Government Bond Series	Dupree & Company, Inc.	15
International Equity Income Funds	3 Years	QS International Dividend Fund, IS	Legg Mason	11
International Income Funds	3 Years	PIMCO Foreign Bond Fund (US Dollar-Hedged), Institutional	PIMCO	31
International Large-Cap Core Funds	3 Years	Ivy International Core Equity Fund, I	Ivy Investment Management Company	34
International Large-Cap Growth Funds	3 Years	Harding Loevner International Equity Portfolio, Institutional	Harding Loevner, LP	33
International Large-Cap Value Funds	3 Years	Laudus Mondrian International Equity Fund, Institutional	Charles Schwab Investment Management, Inc.	13
International Multi-Cap Core Funds	3 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged), Institutional	PIMCO	96
International Multi-Cap Growth Funds	3 Years	Morgan Stanley Institutional International Opportunity Portfolio, I	Morgan Stanley Investment Management, Inc.	110
International Multi-Cap Value Funds	3 Years	Hartford International Value Fund, Y	Hartford Funds	36
International Real Estate Funds	3 Years	Virtus International Real Estate Securities Fund, I	Virtus Investment Partners, Inc.	11
International Small/Mid-Cap Core Funds	3 Years	Schwab Fundamental International Small Company Index Fund	Charles Schwab Investment Management, Inc.	23
International Small/Mid-Cap Growth Funds	3 Years	Oppenheimer International Small-Mid Company Fund, I	OppenheimerFunds, Inc.	44
Large-Cap Core Funds	3 Years	Clipper Fund	Clipper Funds	229
Large-Cap Growth Funds	3 Years	Shelton NASDAQ-100 Index Fund, Direct	Shelton Capital Management	166
Large-Cap Value Funds	3 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Funds	106
Loan Participation Funds	3 Years	Natixis Loomis Sayles Senior Floating Rate and Fixed Income Fund, Y	Loomis Sayles & Company, LP	48
Maryland Municipal Debt Funds	3 Years	Oppenheimer Rochester Maryland Municipal Fund, Y	OppenheimerFunds, Inc.	10
Massachusetts Municipal Debt Funds	3 Years	Oppenheimer Rochester Massachusetts Municipal Fund, A	OppenheimerFunds, Inc.	13
Mid-Cap Core Funds	3 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	112
Mid-Cap Growth Funds	3 Years	PRIMECAP Odyssey Aggressive Growth Fund	PRIMECAP Management Company	103
Mid-Cap Value Funds	3 Years	Westcore Mid-Cap Value Dividend Fund, Retail	Westcore Funds	35
Minnesota Municipal Debt Funds	3 Years	Oppenheimer Rochester Minnesota Municipal Fund, Y	OppenheimerFunds, Inc.	13
Mixed-Asset Target 2010 Funds	3 Years	American Funds 2010 Target Date Retirement Fund, R-6	American Funds	28
Mixed-Asset Target 2015 Funds	3 Years	American Funds 2015 Target Date Retirement Fund, R-6	American Funds	27
Mixed-Asset Target 2020 Funds	3 Years	American Funds 2020 Target Date Retirement Fund, R-6	American Funds	42
Mixed-Asset Target 2025 Funds	3 Years	American Funds 2025 Target Date Retirement Fund, R-6	American Funds	40
Mixed-Asset Target 2030 Funds	3 Years	American Funds 2030 Target Date Retirement Fund, R-6	American Funds	42
Mixed-Asset Target 2035 Funds	3 Years	American Funds 2035 Target Date Retirement Fund, R-6	American Funds	38

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Mixed-Asset Target 2040 Funds	3 Years	American Funds 2040 Target Date Retirement Fund, R-6	American Funds	40
Mixed-Asset Target 2045 Funds	3 Years	American Funds 2045 Target Date Retirement Fund, R-6	American Funds	38
Mixed-Asset Target 2050 Funds	3 Years	American Funds 2050 Target Date Retirement Fund, R-6	American Funds	41
Mixed-Asset Target 2055+ Funds	3 Years	American Funds 2055 Target Date Retirement Fund, R-6	American Funds	35
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	Great-West Aggressive Profile II Fund, Initial	GW Capital Management, LLC	36
Mixed-Asset Target Allocation Conservative Funds	3 Years	Wells Fargo Diversified Income Builder Fund, Institutional	Wells Fargo Funds Management, LLC	83
Mixed-Asset Target Allocation Growth Funds	3 Years	Wells Fargo Diversified Capital Builder Fund, I	Wells Fargo Funds Management, LLC	128
Mixed-Asset Target Allocation Moderate Funds	3 Years	Wells Fargo Advantage Index Asset Allocation Fund, Administrator	Wells Fargo Funds Management, LLC	134
Mixed-Asset Target Today Funds	3 Years	American Century One Choice In Retirement Portfolio, R6	American Century Investment Management, Inc.	29
Multi-Cap Core Funds	3 Years	Parnassus Endeavor Fund	Parnassus Investments	224
Multi-Cap Growth Funds	3 Years	Catalyst Dynamic Alpha Fund, A	Catalyst Funds	155
Multi-Cap Value Funds	3 Years	American Century NT Mid Cap Value Fund, R6	American Century Investment Management, Inc.	95
Multi-Sector Income Funds	3 Years	PIMCO Income Fund, Institutional	PIMCO	71
Natural Resources Funds	3 Years	Tortoise Select Opportunity Fund, Institutional	Tortoise Capital Advisors, LLC	19
New Jersey Municipal Debt Funds	3 Years	Oppenheimer Rochester New Jersey Municipal Fund, Y	OppenheimerFunds, Inc.	15
New York Intermediate Municipal Debt Funds	3 Years	Neuberger Berman New York Municipal Income Fund, Institutional	Neuberger Berman Management, LLC	11
New York Municipal Debt Funds	3 Years	Oppenheimer Rochester AMT-Free New York Municipals, Y	OppenheimerFunds, Inc.	26
Ohio Municipal Debt Funds	3 Years	Oppenheimer Rochester Ohio Municipal Fund, Y	OppenheimerFunds, Inc.	12
Pacific Ex-Japan Funds	3 Years	Matthews Pacific Tiger Fund, Institutional	Matthews International Capital Management, LLC	15
Pacific Region Funds	3 Years	Fidelity Pacific Basin Fund	Fidelity Management & Research Company	13
Pennsylvania Municipal Debt Funds	3 Years	Oppenheimer Rochester Pennsylvania Municipal Fund, Y	OppenheimerFunds, Inc.	18
Precious Metals Equity Funds	3 Years	US Global Investors Gold & Precious Metals Fund	US Global Investors Funds	20
Real Estate Funds	3 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management, Inc.	65
Retirement Income Funds	3 Years	Fidelity Income Replacement 2042 Fund	Fidelity Management & Research Company	23
Science & Technology Funds	3 Years	Fidelity Advisor Semiconductors Fund, I	Fidelity Management & Research Company	39
Short Investment-Grade Debt Funds	3 Years	Morgan Stanley Institutional Short Duration Income Portfolio, I	Morgan Stanley Investment Management, Inc.	74
Short Municipal Debt Funds	3 Years	Oppenheimer Rochester Short Term Municipal Fund, Y	OppenheimerFunds, Inc.	32
Short U.S. Government Funds	3 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	25
Short-Intermediate Investment-Grade Debt Funds	3 Years	BMO TCH Intermediate Income Fund, I	BMO Asset Management Corporation	43
Short-Intermediate Municipal Debt Funds	3 Years	Oppenheimer Rochester Limited Term Municipal Fund, Y	OppenheimerFunds, Inc.	20
Short-Intermediate U.S. Government Funds	3 Years	Thornburg Limited Term US Government Fund, Institutional	Thornburg Investment Management, Inc.	10
Small-Cap Core Funds	3 Years	Shelton S&P SmallCap Index Fund, K	Shelton Capital Management	252

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Small-Cap Growth Funds	3 Years	AMG Managers Cadence Emerging Companies Fund, I	AMG Funds, LLC	147
Small-Cap Value Funds	3 Years	PF Small-Cap Value Fund, P	Pacific Life Insurance Company	89
U.S. Mortgage Funds	3 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management, Inc.	29
Ultra-Short Obligation Funds	3 Years	PIMCO Short-Term Fund, Institutional	PIMCO	39
Utility Funds	3 Years	Vanguard Utilities Index Fund, Admiral	Vanguard Group, Inc.	14
Virginia Municipal Debt Funds	3 Years	Oppenheimer Rochester Virginia Municipal Fund, A	OppenheimerFunds, Inc.	11
Absolute Return Funds	5 Years	Cavanal Hill Opportunistic Fund, Institutional	Cavanal Hill Funds	28
Alternative Credit Focus Funds	5 Years	Guggenheim Macro Opportunities Fund, Institutional	Guggenheim Investments	34
Alternative Equity Market Neutral Funds	5 Years	Gateway Fund, Y	Gateway Investment Advisers, LLC	14
Alternative Global Macro Funds	5 Years	SEI Institutional Investments Trust Dynamic Asset Allocation Fund, A	SEI Group	47
Alternative Long/Short Equity Funds	5 Years	Guggenheim Alpha Opportunity Fund, Institutional	Guggenheim Investments	45
Alternative Managed Futures Funds	5 Years	Altegris Futures Evolution Strategy Fund, I	Altegris Advisors, LLC	13
Alternative Multi-Strategy Funds	5 Years	EnTrustPermal Alternative Core Fund, IS	Legg Mason	17
California Intermediate Municipal Debt Funds	5 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	15
California Municipal Debt Funds	5 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	32
China Region Funds	5 Years	Matthews China Dividend Fund, Institutional	Matthews International Capital Management, LLC	19
Commodities General Funds	5 Years	Deutsche Enhanced Commodity Strategy Fund, Institutional	Deutsche Asset & Wealth Management	22
Convertible Securities Funds	5 Years	MainStay Convertible Fund, I	MainStay Funds	17
Core Bond Funds	5 Years	BlackRock Total Return Fund, K	BlackRock, Inc.	119
Core Plus Bond Funds	5 Years	Morgan Stanley Institutional Core Plus Fixed Income Portfolio, I	Morgan Stanley Investment Management, Inc.	53
Corporate Debt A-Rated Funds	5 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	14
Corporate Debt BBB-Rated Funds	5 Years	Morgan Stanley Institutional Corporate Bond Portfolio, I	Morgan Stanley Investment Management, Inc.	57
Dedicated Short-Bias Funds	5 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	31
Emerging Markets Funds	5 Years	HSBC Frontier Markets Fund, I	HSBC Global Asset Management (USA), Inc.	142
Emerging Markets Hard Currency Debt Funds	5 Years	GMO Emerging Country Debt Fund, IV	Grantham Mayo Van Otterloo & Company, LLC	37
Emerging Markets Local Currency Debt Funds	5 Years	Eaton Vance Emerging Markets Local Income Fund, I	Eaton Vance Management	14
Equity Income Funds	5 Years	KEELEY Mid Cap Dividend Value Fund, I	Keeley Asset Management Corporation	92
European Region Funds	5 Years	DFA Continental Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	21
Financial Services Funds	5 Years	RMB Mendon Financial Services Fund, A	RMB Capital Management	22
Flexible Income Funds	5 Years	Cohen & Steers Preferred Securities & Income Fund, I	Cohen & Steers Capital Management, Inc.	14
Flexible Portfolio Funds	5 Years	GuideStone Defensive Market Strategies Fund, Institutional	GuideStone Funds Trust	107
General & Insured Municipal Debt Funds	5 Years	Oppenheimer Rochester AMT-Free Municipal Fund, Y	OppenheimerFunds, Inc.	74

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
General Bond Funds	5 Years	Fidelity Real Estate High Income Fund	Fidelity Management & Research Company	17
General U.S. Government Funds	5 Years	Morgan Stanley US Government Securities Trust, I	Morgan Stanley Investment Management, Inc.	23
General U.S. Treasury Funds	5 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	15
Global Equity Income Funds	5 Years	Steward Global Equity Income Fund, Institutional	Capstone Asset Management Company	22
Global Income Funds	5 Years	PIMCO Global Bond Fund (US Dollar-Hedged), Institutional	PIMCO	36
Global Infrastructure Funds	5 Years	Lazard Global Listed Infrastructure Portfolio, Institutional	Lazard Asset Management, LLC	12
Global Large-Cap Core Funds	5 Years	Thrivent Large Cap Stock Fund, S	Thrivent Mutual Funds	11
Global Large-Cap Growth Funds	5 Years	American Funds New Perspective Fund, R-6	American Funds	16
Global Large-Cap Value Funds	5 Years	Brandes Global Equity Fund, I	Brandes Investment Partners, LP	12
Global Multi-Cap Core Funds	5 Years	USAA Capital Growth Fund	USAA Asset Management Company	34
Global Multi-Cap Growth Funds	5 Years	Victory RS Global Fund, R	Victory Capital Management, Inc.	51
Global Multi-Cap Value Funds	5 Years	Polaris Global Value Fund	Polaris Capital Management, LLC	20
Global Natural Resources Funds	5 Years	Calvert Global Water Fund, Y	Calvert Investments, Inc.	25
Global Real Estate Funds	5 Years	Brookfield Global Listed Real Estate Fund, Y	Brookfield Investment Management, Inc.	35
Global Small-/Mid-Cap Funds	5 Years	Morgan Stanley Institutional Global Discovery Portfolio, I	Morgan Stanley Investment Management, Inc.	24
GNMA Funds	5 Years	Voya GNMA Income Fund, I	Voya Investments, LLC	17
Health/Biotechnology Funds	5 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	22
High Yield Funds	5 Years	Lord Abbett High Yield Fund, I	Lord Abbett & Company, LLC	130
High Yield Municipal Debt Funds	5 Years	Nuveen High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	31
Industrials Funds	5 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	10
Inflation-Protected Bond Funds	5 Years	Janus Real Return Fund, I	Janus Capital Management, LLC	42
Intermediate Municipal Debt Funds	5 Years	BlackRock Strategic Municipal Opportunities Fund, Institutional	BlackRock, Inc.	54
Intermediate U.S. Government Funds	5 Years	Dupree Intermediate Government Bond Series	Dupree & Company, Inc.	15
International Income Funds	5 Years	PIMCO Foreign Bond Fund (US Dollar-Hedged), Institutional	PIMCO	24
International Large-Cap Core Funds	5 Years	Ivy International Core Equity Fund, I	Ivy Investment Management Company	33
International Large-Cap Growth Funds	5 Years	American Funds EuroPacific Growth Fund, R-6	American Funds	30
International Large-Cap Value Funds	5 Years	Laudus Mondrian International Equity Fund, Institutional	Charles Schwab Investment Management, Inc.	12
International Multi-Cap Core Funds	5 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged), Institutional	PIMCO	84
International Multi-Cap Growth Funds	5 Years	Fidelity Overseas Fund, K	Fidelity Management & Research Company	99
International Multi-Cap Value Funds	5 Years	Hartford International Value Fund, Y	Hartford Funds	35
International Real Estate Funds	5 Years	Fidelity Advisor International Real Estate Fund, I	Fidelity Management & Research Company	11
International Small/Mid-Cap Core Funds	5 Years	Pear Tree Polaris Foreign Value Small Cap Fund, Institutional	Pear Tree Advisors, Inc.	20

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
International Small/Mid-Cap Growth Funds	5 Years	Oppenheimer International Small-Mid Company Fund, Y	OppenheimerFunds, Inc.	40
Large-Cap Core Funds	5 Years	Vanguard PRIMECAP Fund, Admiral	PRIMECAP Management Company	211
Large-Cap Growth Funds	5 Years	ClearBridge Large Cap Growth Fund, I	Legg Mason	156
Large-Cap Value Funds	5 Years	Dodge & Cox Stock Fund	Dodge & Cox	99
Loan Participation Funds	5 Years	Natixis Loomis Sayles Senior Floating Rate and Fixed Income Fund, Y	Loomis Sayles & Company, LP	38
Maryland Municipal Debt Funds	5 Years	T. Rowe Price Maryland Tax-Free Bond Fund	T. Rowe Price Associates, Inc.	10
Massachusetts Municipal Debt Funds	5 Years	Nuveen Massachusetts Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mid-Cap Core Funds	5 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	102
Mid-Cap Growth Funds	5 Years	PRIMECAP Odyssey Aggressive Growth Fund	PRIMECAP Management Company	99
Mid-Cap Value Funds	5 Years	Harbor Mid Cap Value Fund, Institutional	Harbor Capital Advisors, Inc.	33
Minnesota Municipal Debt Funds	5 Years	Oppenheimer Rochester Minnesota Municipal Fund, Y	OppenheimerFunds, Inc.	13
Mixed-Asset Target 2010 Funds	5 Years	American Funds 2010 Target Date Retirement Fund, R-6	American Funds	22
Mixed-Asset Target 2015 Funds	5 Years	American Funds 2015 Target Date Retirement Fund, R-6	American Funds	22
Mixed-Asset Target 2020 Funds	5 Years	American Funds 2020 Target Date Retirement Fund, R-6	American Funds	33
Mixed-Asset Target 2025 Funds	5 Years	American Funds 2025 Target Date Retirement Fund, R-6	American Funds	30
Mixed-Asset Target 2030 Funds	5 Years	American Funds 2030 Target Date Retirement Fund, R-6	American Funds	32
Mixed-Asset Target 2035 Funds	5 Years	American Funds 2035 Target Date Retirement Fund, R-6	American Funds	30
Mixed-Asset Target 2040 Funds	5 Years	American Funds 2040 Target Date Retirement Fund, R-6	American Funds	32
Mixed-Asset Target 2045 Funds	5 Years	American Funds 2045 Target Date Retirement Fund, R-6	American Funds	28
Mixed-Asset Target 2050 Funds	5 Years	American Funds 2050 Target Date Retirement Fund, R-6	American Funds	32
Mixed-Asset Target 2055+ Funds	5 Years	American Funds 2055 Target Date Retirement Fund, R-6	American Funds	20
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	Great-West Aggressive Profile II Fund, Initial	GW Capital Management, LLC	34
Mixed-Asset Target Allocation Conservative Funds	5 Years	Wells Fargo Diversified Income Builder Fund, Institutional	Wells Fargo Funds Management, LLC	74
Mixed-Asset Target Allocation Growth Funds	5 Years	Wells Fargo Diversified Capital Builder Fund, I	Wells Fargo Funds Management, LLC	121
Mixed-Asset Target Allocation Moderate Funds	5 Years	Wells Fargo Advantage Index Asset Allocation Fund, Administrator	Wells Fargo Funds Management, LLC	125
Mixed-Asset Target Today Funds	5 Years	American Century One Choice In Retirement Portfolio, Institutional	American Century Investment Management, Inc.	25
Multi-Cap Core Funds	5 Years	Parnassus Endeavor Fund	Parnassus Investments	206
Multi-Cap Growth Funds	5 Years	Vanguard Capital Opportunity Fund, Admiral	PRIMECAP Management Company	140
Multi-Cap Value Funds	5 Years	Poplar Forest Partners Fund, Institutional	Poplar Forest Capital, LLC	91
Multi-Sector Income Funds	5 Years	PIMCO Income Fund, Institutional	PIMCO	53
Natural Resources Funds	5 Years	Waddell & Reed Advisors Energy Fund, Y	Waddell & Reed Investment Management Company	16
New Jersey Municipal Debt Funds	5 Years	Lord Abbett New Jersey Tax Free Fund, I	Lord Abbett & Company, LLC	15

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
New York Intermediate Municipal Debt Funds	5 Years	Franklin New York Intermediate-Term Tax-Free Income Fund, Advisor	Franklin Templeton Investments	10
New York Municipal Debt Funds	5 Years	BlackRock New York Municipal Opportunities Fund, Institutional	BlackRock, Inc.	25
Ohio Municipal Debt Funds	5 Years	Oppenheimer Rochester Ohio Municipal Fund, Y	OppenheimerFunds, Inc.	12
Pacific Ex-Japan Funds	5 Years	Matthews Pacific Tiger Fund, Institutional	Matthews International Capital Management, LLC	14
Pacific Region Funds	5 Years	Fidelity Pacific Basin Fund	Fidelity Management & Research Company	12
Pennsylvania Municipal Debt Funds	5 Years	Oppenheimer Rochester Pennsylvania Municipal Fund, Y	OppenheimerFunds, Inc.	18
Precious Metals Equity Funds	5 Years	US Global Investors Gold & Precious Metals Fund	US Global Investors Funds	18
Real Estate Funds	5 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management, Inc.	61
Retirement Income Funds	5 Years	Fidelity Income Replacement 2042 Fund	Fidelity Management & Research Company	23
Science & Technology Funds	5 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Company	38
Short Investment-Grade Debt Funds	5 Years	Lord Abbett Short Duration Income Fund, I	Lord Abbett & Company, LLC	69
Short Municipal Debt Funds	5 Years	Oppenheimer Rochester Short Term Municipal Fund, Y	OppenheimerFunds, Inc.	29
Short U.S. Government Funds	5 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	25
Short-Intermediate Investment-Grade Debt Funds	5 Years	Virtus Multi-Sector Short Term Bond Fund, I	Virtus Investment Partners, Inc.	37
Short-Intermediate Municipal Debt Funds	5 Years	Wells Fargo Strategic Municipal Bond Fund, Administrator	Wells Fargo Funds Management, LLC	20
Short-Intermediate U.S. Government Funds	5 Years	Natixis Loomis Sayles Limited Term Government and Agency Fund, Y	Loomis Sayles & Company, LP	10
Small-Cap Core Funds	5 Years	Shelton S&P SmallCap Index Fund, K	Shelton Capital Management	229
Small-Cap Growth Funds	5 Years	Hood River Small-Cap Growth Fund, Institutional	Hood River Capital Management, LLC	137
Small-Cap Value Funds	5 Years	Towle Deep Value Fund	Towle & Co.	82
U.S. Mortgage Funds	5 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management, Inc.	29
Ultra-Short Obligation Funds	5 Years	Delaware Diversified Floating Rate Fund, I	Delaware Management Company	32
Utility Funds	5 Years	Prudential Jennison Utility Fund, Z	Prudential Investments	14
Virginia Municipal Debt Funds	5 Years	USAA Virginia Bond Fund, Fund	USAA Asset Management Company	11
Alternative Credit Focus Funds	10 Years	Iron Strategic Income Fund, Institutional	Iron Financial, LLC	11
Alternative Global Macro Funds	10 Years	GMO Strategic Opportunities Allocation Fund, III	Grantham Mayo Van Otterloo & Company, LLC	16
Alternative Long/Short Equity Funds	10 Years	Boston Partners Long/Short Equity Fund, Institutional	Boston Partners	16
California Intermediate Municipal Debt Funds	10 Years	Columbia AMT-Free California Intermediate Muni Bond Fund, Z	Columbia Funds	13
California Municipal Debt Funds	10 Years	Nuveen California Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	32
China Region Funds	10 Years	Columbia Greater China Fund, Z	Columbia Funds	14
Convertible Securities Funds	10 Years	AllianzGI Convertible Fund, Institutional	Allianz Global Investors	13
Core Bond Funds	10 Years	TCW Core Fixed Income Fund, I	TCW Investment Management Company	103
Core Plus Bond Funds	10 Years	Natixis Loomis Sayles Core Plus Bond Fund, Y	Loomis Sayles & Company, LP	42

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Corporate Debt A-Rated Funds	10 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	13
Corporate Debt BBB-Rated Funds	10 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	42
Dedicated Short-Bias Funds	10 Years	Leuthold Grizzly Short Fund	Leuthold Weeden Capital Management, LLC	28
Emerging Markets Funds	10 Years	Oppenheimer Developing Markets Fund, Y	OppenheimerFunds, Inc.	70
Emerging Markets Hard Currency Debt Funds	10 Years	TCW Emerging Markets Income Fund, I	TCW Investment Management Company	19
Equity Income Funds	10 Years	Parnassus Core Equity Fund, Institutional	Parnassus Investments	73
European Region Funds	10 Years	Invesco European Small Company Fund, A	Invesco Funds	19
Financial Services Funds	10 Years	Alpine Financial Services Fund, Institutional	Alpine Woods Capital Investors, LLC	22
Flexible Portfolio Funds	10 Years	FPA Crescent Fund	First Pacific Advisors, LLC	51
General & Insured Municipal Debt Funds	10 Years	Nuveen All-American Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	62
General U.S. Government Funds	10 Years	PIMCO Long-Term US Government Fund, Institutional	PIMCO	19
General U.S. Treasury Funds	10 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	13
Global Equity Income Funds	10 Years	Columbia Global Dividend Opportunity Fund, Z	Columbia Funds	10
Global Income Funds	10 Years	PIMCO Global Bond Fund (US Dollar-Hedged), Institutional	PIMCO	26
Global Large-Cap Growth Funds	10 Years	American Funds New Perspective Fund, R-5	American Funds	12
Global Multi-Cap Core Funds	10 Years	DFA Global Equity Portfolio, Institutional	Dimensional Fund Advisors, LP	21
Global Multi-Cap Growth Funds	10 Years	Janus Global Research Fund, D	Janus Capital Management, LLC	26
Global Multi-Cap Value Funds	10 Years	Nuveen Tradewinds Value Opportunities Fund, I	Nuveen Fund Advisors, LLC	13
Global Natural Resources Funds	10 Years	VanEck Global Hard Assets Fund, I	Van Eck Associates Corporation	17
Global Real Estate Funds	10 Years	AB Global Real Estate Investment Fund II, I	AllianceBernstein, LP	18
Global Small-/Mid-Cap Funds	10 Years	American Funds SMALLCAP World Fund, R-5	American Funds	17
GNMA Funds	10 Years	PIMCO GNMA Fund, Institutional	PIMCO	17
Health/Biotechnology Funds	10 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	20
High Yield Funds	10 Years	AB High Income Fund, A	AllianceBernstein, LP	102
High Yield Municipal Debt Funds	10 Years	Delaware National High-Yield Municipal Bond Fund, A	Delaware Management Company	27
Inflation-Protected Bond Funds	10 Years	PIMCO Fixed Income SHares Series R	Allianz Global Investors	30
Intermediate Municipal Debt Funds	10 Years	BlackRock Strategic Municipal Opportunities Fund, Institutional	BlackRock, Inc.	44
Intermediate U.S. Government Funds	10 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors, LP	13
International Income Funds	10 Years	PIMCO Foreign Bond Fund (US Dollar-Hedged), Institutional	PIMCO	14
International Large-Cap Core Funds	10 Years	Ivy International Core Equity Fund, Y	Ivy Investment Management Company	26
International Large-Cap Growth Funds	10 Years	Harding Loevner International Equity Portfolio, Institutional	Harding Loevner, LP	22
International Multi-Cap Core Funds	10 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged), Institutional	PIMCO	55

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
International Multi-Cap Growth Funds	10 Years	Schwab Laudus International MarketMasters Fund, Select	Charles Schwab Investment Management, Inc.	72
International Multi-Cap Value Funds	10 Years	John Hancock International Value Fund, NAV	John Hancock Group	25
International Small/Mid-Cap Core Funds	10 Years	GMO Foreign Small Companies Fund, III	Grantham Mayo Van Otterloo & Company, LLC	14
International Small/Mid-Cap Growth Funds	10 Years	Wasatch International Growth Fund, Investor	Wasatch Advisors, Inc.	26
Large-Cap Core Funds	10 Years	Vanguard PRIMECAP Fund, Admiral	PRIMECAP Management Company	187
Large-Cap Growth Funds	10 Years	Shelton NASDAQ-100 Index Fund, Direct	Shelton Capital Management	133
Large-Cap Value Funds	10 Years	Columbia Select Large-Cap Value Fund, R5	Columbia Funds	82
Loan Participation Funds	10 Years	Oppenheimer Senior Floating Rate Fund, Y	OppenheimerFunds, Inc.	15
Maryland Municipal Debt Funds	10 Years	T. Rowe Price Maryland Tax-Free Bond Fund	T. Rowe Price Associates, Inc.	10
Massachusetts Municipal Debt Funds	10 Years	Nuveen Massachusetts Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mid-Cap Core Funds	10 Years	Scout Mid Cap Fund	Scout Investments, Inc.	81
Mid-Cap Growth Funds	10 Years	T. Rowe Price Institutional Mid-Cap Equity Growth Fund	T. Rowe Price Associates, Inc.	87
Mid-Cap Value Funds	10 Years	Meeder Quantex Fund, Retail	Meeder Asset Management, Inc.	26
Minnesota Municipal Debt Funds	10 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mixed-Asset Target 2010 Funds	10 Years	T. Rowe Price Retirement 2010 Fund	T. Rowe Price Associates, Inc.	13
Mixed-Asset Target 2020 Funds	10 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	16
Mixed-Asset Target 2030 Funds	10 Years	T. Rowe Price Retirement 2030 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target 2040 Funds	10 Years	T. Rowe Price Retirement 2040 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	Great-West Aggressive Profile II Fund, Initial	GW Capital Management, LLC	31
Mixed-Asset Target Allocation Conservative Funds	10 Years	Vanguard Wellesley Income Fund, Admiral	Vanguard Group, Inc.	66
Mixed-Asset Target Allocation Growth Funds	10 Years	T. Rowe Price Capital Appreciation Fund	T. Rowe Price Associates, Inc.	109
Mixed-Asset Target Allocation Moderate Funds	10 Years	Hartford Balanced Income Fund, Y	Hartford Funds	108
Mixed-Asset Target Today Funds	10 Years	MFS Lifetime Income Fund, I	MFS Investment Management	12
Multi-Cap Core Funds	10 Years	Parnassus Endeavor Fund	Parnassus Investments	158
Multi-Cap Growth Funds	10 Years	Fidelity OTC Portfolio	Fidelity Management & Research Company	115
Multi-Cap Value Funds	10 Years	American Century NT Mid Cap Value Fund, Institutional	American Century Investment Management, Inc.	79
Multi-Sector Income Funds	10 Years	Lord Abbett Bond-Debenture Fund, I	Lord Abbett & Company, LLC	33
Natural Resources Funds	10 Years	Waddell & Reed Advisors Energy Fund, Y	Waddell & Reed Investment Management Company	16
New Jersey Municipal Debt Funds	10 Years	Nuveen New Jersey Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	15
New York Intermediate Municipal Debt Funds	10 Years	BNY Mellon New York Intermediate Tax-Exempt Bond Fund, M	Dreyfus Corporation	10
New York Municipal Debt Funds	10 Years	Delaware Tax-Free New York Fund, A	Delaware Management Company	24
Ohio Municipal Debt Funds	10 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	12

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Pacific Region Funds	10 Years	Matthews Asia Growth Fund, Investor	Matthews International Capital Management, LLC	10
Pennsylvania Municipal Debt Funds	10 Years	Nuveen Pennsylvania Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	18
Precious Metals Equity Funds	10 Years	VanEck International Investors Gold Fund, I	Van Eck Associates Corporation	18
Real Estate Funds	10 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management, Inc.	49
Science & Technology Funds	10 Years	Red Oak Technology Select Fund	Oak Associates, Ltd.	38
Short Investment-Grade Debt Funds	10 Years	Lord Abbett Short Duration Income Fund, I	Lord Abbett & Company, LLC	61
Short Municipal Debt Funds	10 Years	RidgeWorth Seix Short-Term Municipal Bond Fund, I	RidgeWorth Funds	23
Short U.S. Government Funds	10 Years	Wells Fargo Short Duration Government Bond Fund, I	Wells Fargo Funds Management, LLC	22
Short-Intermediate Investment-Grade Debt Funds	10 Years	Thompson Bond Fund	Thompson Investment Management, Inc.	32
Short-Intermediate Municipal Debt Funds	10 Years	Thornburg Limited Term Municipal Fund, Institutional	Thornburg Investment Management, Inc.	17
Short-Intermediate U.S. Government Funds	10 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company	10
Small-Cap Core Funds	10 Years	PIMCO StocksPLUS Small Fund, Institutional	PIMCO	189
Small-Cap Growth Funds	10 Years	T. Rowe Price New Horizons Fund	T. Rowe Price Associates, Inc.	118
Small-Cap Value Funds	10 Years	American Beacon Small Cap Value Fund, Institutional	American Beacon Advisors, Inc.	58
U.S. Mortgage Funds	10 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	24
Ultra-Short Obligation Funds	10 Years	Calvert Ultra-Short Income Fund, A	Calvert Investments, Inc.	21
Utility Funds	10 Years	Hennessy Gas Utility Fund, Investor	Hennessy Funds	14
Virginia Municipal Debt Funds	10 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	11

The United States Winner List PDF file was updated on Monday, March 27. While there were no changes to the actual Lipper Fund Awards recipient list, on Friday, March 24 the winner list had shown share class count rather than fund or portfolio count, which has been used historically in our list. Although both numbers are correct, the fund or portfolio count better reflects the U.S. Lipper Fund Awards methodology and is now shown in the fund count column.

