



# LIPPER FUND AWARDS FROM REFINITIV

2019 WINNER  
UNITED STATES

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	PIMCO
Equity	Small Company	PRIMECAP Management Company
Fixed Income	Large Company	Morgan Stanley Investment Management, Inc.
Fixed Income	Small Company	Ashmore Funds
Mixed Assets	Large Company	TIAA Investments
Mixed Assets	Small Company	Thrivent Mutual Funds
Overall	Large Company	PIMCO
Overall	Small Company	GuideStone Funds

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Funds	3 Years	Spectrum Advisors Preferred Fund, Investor	Advisors Preferred, LLC	56
Alternative Credit Focus Funds	3 Years	Highland Opportunistic Credit Fund, Z	Highland Capital Management Fund Advisors, LP	59
Alternative Equity Market Neutral Funds	3 Years	Nuveen Equity Market Neutral Fund, I	Nuveen Fund Advisors, LLC	24
Alternative Event Driven Funds	3 Years	Catalyst IPOx Allocation Fund, I	Catalyst Funds	19
Alternative Global Macro Funds	3 Years	GMO Special Opportunities Fund, VI	Grantham Mayo Van Otterloo & Company, LLC	65
Alternative Long/Short Equity Funds	3 Years	Gotham Enhanced 500 Fund, Institutional	Gotham Asset Management, LLC	84
Alternative Managed Futures Funds	3 Years	361 Global Managed Futures Strategy Fund, I	361 Capital, LLC	28
Alternative Multi-Strategy Funds	3 Years	Infinity Q Diversified Alpha Fund, Institutional	Infinity Q Capital Management, LLC	50
California Intermediate Municipal Debt Funds	3 Years	BlackRock California Municipal Opportunities Fund, Institutional	BlackRock, Inc.	18
California Municipal Debt Funds	3 Years	Oppenheimer Rochester California Municipal Fund, Y	OppenheimerFunds, Inc.	32

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
China Region Funds	3 Years	Eaton Vance Greater China Growth Fund, I	Eaton Vance Management	17
Commodities General Funds	3 Years	BlackRock Commodity Strategies Fund, Institutional	BlackRock, Inc.	27
Convertible Securities Funds	3 Years	Franklin Convertible Securities Fund, R6	Franklin Templeton Investments	18
Core Bond Funds	3 Years	Highland Fixed Income Fund, Y	Highland Capital Management Fund Advisors, LP	124
Core Plus Bond Funds	3 Years	Eaton Vance Core Plus Bond Fund, I	Eaton Vance Management	61
Corporate Debt A-Rated Funds	3 Years	Ave Maria Bond Fund	Schwartz Investment Counsel, Inc.	16
Corporate Debt BBB-Rated Funds	3 Years	Morgan Stanley Institutional Corporate Bond Portfolio, I	Morgan Stanley Investment Management, Inc.	59
Dedicated Short-Bias Funds	3 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	32
Emerging Markets Funds	3 Years	Ashmore Emerging Markets Equity Fund, Institutional	Ashmore Funds	212
Emerging Markets Hard Currency Debt Funds	3 Years	Ashmore Emerging Markets Short Duration Fund, Institutional	Ashmore Funds	64
Emerging Markets Local Currency Debt Funds	3 Years	Ashmore Emerging Markets Local Currency Bond Fund, Institutional	Ashmore Funds	17
Energy MLP Funds	3 Years	Cohen & Steers MLP & Energy Opportunity Fund, Z	Cohen & Steers Capital Management, Inc.	29
Equity Income Funds	3 Years	Stock Dividend Fund, Inc.	Adams Asset Advisors, LLC	128
European Region Funds	3 Years	Invesco European Small Company Fund, Y	Invesco Funds	20
Financial Services Funds	3 Years	Vanguard Financials Index Fund, Admiral	Vanguard Group, Inc.	23
Flexible Income Funds	3 Years	PIMCO Preferred and Capital Securities Fund, Institutional	PIMCO	18
Flexible Portfolio Funds	3 Years	Kinetics Market Opportunities Fund, Institutional	Kinetics Asset Management, LLC	156
General & Insured Municipal Debt Funds	3 Years	Oppenheimer Rochester AMT-Free Municipal Fund, Y	OppenheimerFunds, Inc.	80
General Bond Funds	3 Years	Cavalier Adaptive Income Fund, Institutional	Cavalier Investments, Inc.	20
General U.S. Government Funds	3 Years	Morgan Stanley U.S. Government Securities Trust, I	Morgan Stanley Investment Management, Inc.	20
General U.S. Treasury Funds	3 Years	American Century Zero Coupon 2025 Fund, Investor	American Century Investment Management, Inc.	11

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Global Equity Income Funds	3 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments	34
Global Income Funds	3 Years	John Hancock Global Short Duration Credit Fund, NAV	John Hancock Group	43
Global Infrastructure Funds	3 Years	Voya CBRE Global Infrastructure Fund, I	Voya Investments, LLC	17
Global Large-Cap Core Funds	3 Years	1290 SmartBeta Equity Fund, T	AXA Equitable Funds Management Group, LLC	15
Global Large-Cap Growth Funds	3 Years	Polen Global Growth Fund, Institutional	Polen Capital Management, LLC	30
Global Large-Cap Value Funds	3 Years	Dodge & Cox Global Stock Fund	Dodge & Cox	11
Global Multi-Cap Core Funds	3 Years	AB Global Core Equity Portfolio, Advisor	AllianceBernstein, LP	43
Global Multi-Cap Growth Funds	3 Years	Baron Global Advantage Fund, Institutional	BAMCO, Inc.	52
Global Multi-Cap Value Funds	3 Years	Fidelity Series Intrinsic Opportunistic Fund	Fidelity Management & Research Company	36
Global Natural Resources Funds	3 Years	GMO Resources Fund, IV	Grantham Mayo Van Otterloo & Company, LLC	25
Global Real Estate Funds	3 Years	Schwab Fundamental Global Real Estate Index Fund	Charles Schwab Investment Management, Inc.	41
Global Small-/Mid-Cap Funds	3 Years	Oppenheimer Global Opportunities Fund, I	OppenheimerFunds, Inc.	33
GNMA Funds	3 Years	Voya GNMA Income Fund, I	Voya Investments, LLC	13
Health/Biotechnology Funds	3 Years	Fidelity Select Medical Technology and Devices Portfolio	Fidelity Management & Research Company	23
High Yield Funds	3 Years	Catalyst/SMH High Income Fund, I	Catalyst Funds	155
High Yield Municipal Debt Funds	3 Years	Oppenheimer Rochester High Yield Municipal Fund, Y	OppenheimerFunds, Inc.	44
Industrials Funds	3 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	10
Inflation-Protected Bond Funds	3 Years	Invesco Strategic Real Return Fund, Y	Invesco Funds	48
Intermediate Municipal Debt Funds	3 Years	BlackRock Strategic Municipal Opportunities Fund, Institutional	BlackRock, Inc.	61
Intermediate U.S. Government Funds	3 Years	American Funds Mortgage Fund, R6	American Funds	12
International Equity Income Funds	3 Years	BlackRock Emerging Markets Dividend Fund, Institutional	BlackRock, Inc.	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Income Funds	3 Years	Harvest Asian Bond Fund, Institutional	Harvest Global Investments Limited	26
International Large-Cap Core Funds	3 Years	Vanguard International Value Fund, Investor	Vanguard Group, Inc.	21
International Large-Cap Growth Funds	3 Years	Vanguard International Growth Fund, Admiral	Vanguard Group, Inc.	44
International Multi-Cap Core Funds	3 Years	Catholic Investor International Equity Fund, I	Knights of Columbus Asset Advisors, LLC	94
International Multi-Cap Growth Funds	3 Years	Morgan Stanley Institutional International Advantage Portfolio, I	Morgan Stanley Investment Management, Inc.	125
International Multi-Cap Value Funds	3 Years	Hartford International Value Fund, Y	Hartford Funds	44
International Real Estate Funds	3 Years	Fidelity Advisor International Real Estate Fund, I	Fidelity Management & Research Company	11
International Small/Mid-Cap Core Funds	3 Years	Fidelity International Small Cap Fund	Fidelity Management & Research Company	17
International Small/Mid-Cap Growth Funds	3 Years	WCM International Small Cap Growth Fund, Institutional	WCM Investment Management	57
Japanese Funds	3 Years	Hennessy Japan Small Cap Fund, Institutional	Hennessy Advisors, Inc.	10
Large-Cap Core Funds	3 Years	GMO Quality Fund, V	Grantham Mayo Van Otterloo & Company, LLC	190
Large-Cap Growth Funds	3 Years	T. Rowe Price Institutional Large-Cap Growth Fund	T. Rowe Price Associates, Inc.	163
Large-Cap Value Funds	3 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Funds	108
Loan Participation Funds	3 Years	Hartford Floating Rate High Income Fund, R5	Hartford Funds	52
Massachusetts Municipal Debt Funds	3 Years	Vanguard Massachusetts Tax-Exempt Fund, Investor	Vanguard Group, Inc.	12
Mid-Cap Core Funds	3 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	110
Mid-Cap Growth Funds	3 Years	Virtus KAR Mid-Cap Growth Fund, I	Virtus Investment Partners, Inc.	99
Mid-Cap Value Funds	3 Years	Great-West Mid Cap Value Fund, Institutional	GW Capital Management, LLC	44
Minnesota Municipal Debt Funds	3 Years	Sit Minnesota Tax-Free Income Fund	Sit Investment Associates, Inc.	12
Mixed-Asset Target 2010 Funds	3 Years	T. Rowe Price Retirement I 2010 Fund, I	T. Rowe Price Associates, Inc.	26
Mixed-Asset Target 2015 Funds	3 Years	Wells Fargo Dynamic Target 2015 Fund, R6	Wells Fargo Funds Management, LLC	32

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2020 Funds	3 Years	Wells Fargo Dynamic Target 2020 Fund, R6	Wells Fargo Funds Management, LLC	47
Mixed-Asset Target 2025 Funds	3 Years	Wells Fargo Dynamic Target 2025 Fund, R6	Wells Fargo Funds Management, LLC	48
Mixed-Asset Target 2030 Funds	3 Years	Wells Fargo Dynamic Target 2030 Fund, R6	Wells Fargo Funds Management, LLC	49
Mixed-Asset Target 2035 Funds	3 Years	American Funds 2035 Target Date Retirement Fund, R6	American Funds	47
Mixed-Asset Target 2040 Funds	3 Years	American Funds 2040 Target Date Retirement Fund, R6	American Funds	47
Mixed-Asset Target 2045 Funds	3 Years	American Funds 2045 Target Date Retirement Fund, R6	American Funds	46
Mixed-Asset Target 2050 Funds	3 Years	American Funds 2050 Target Date Retirement Fund, R6	American Funds	47
Mixed-Asset Target 2055+ Funds	3 Years	TIAA-CREF Lifecycle Index 2060 Fund, Institutional	TIAA Investments	69
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	MFS Aggressive Growth Allocation Fund, R4	MFS Investment Management	36
Mixed-Asset Target Allocation Conservative Funds	3 Years	Pioneer Multi-Asset Income Fund, K	Amundi Pioneer Asset Management, Inc.	76
Mixed-Asset Target Allocation Growth Funds	3 Years	Wells Fargo Diversified Capital Builder Fund, I	Wells Fargo Funds Management, LLC	122
Mixed-Asset Target Allocation Moderate Funds	3 Years	Catalyst/SMH Total Return Income Fund, I	Catalyst Funds	131
Mixed-Asset Target Today Funds	3 Years	PIMCO RealPath Blend Income Fund, Institutional	PIMCO	36
Multi-Cap Core Funds	3 Years	AQR Large Cap Defensive Style Fund, R6	AQR Capital Management, LLC	203
Multi-Cap Growth Funds	3 Years	Zevenbergen Genea Fund, Institutional	Zevenbergen Capital Investments, LLC	145
Multi-Cap Value Funds	3 Years	Copley Fund	Copley Financial Services Corporation	113
Multi-Sector Income Funds	3 Years	AlphaCentric Income Opportunities Fund, I	AlphaCentric Advisors, LLC	80
Natural Resources Funds	3 Years	ICON Natural Resources Fund, S	Icon Funds	19
New Jersey Municipal Debt Funds	3 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	15
New York Intermediate Municipal Debt Funds	3 Years	BlackRock New York Municipal Opportunities Fund, Institutional	BlackRock, Inc.	13
New York Municipal Debt Funds	3 Years	Oppenheimer Rochester Fund Municipals Fund, Y	OppenheimerFunds, Inc.	25

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Ohio Municipal Debt Funds	3 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	10
Pacific Ex-Japan Funds	3 Years	T. Rowe Price Asia Opportunities Fund	T. Rowe Price Associates, Inc.	18
Pacific Region Funds	3 Years	Matthews Asia Value Fund, Institutional	Matthews International Capital Management, LLC	11
Pennsylvania Municipal Debt Funds	3 Years	Oppenheimer Rochester Pennsylvania Municipal Fund, Y	OppenheimerFunds, Inc.	18
Precious Metals Equity Funds	3 Years	EuroPac Gold Fund, A	Euro Pacific Asset Management, LLC	18
Real Estate Funds	3 Years	Davis Real Estate Fund, Y	Davis Selected Advisers, LP	60
Retirement Income Funds	3 Years	American Funds Retirement Income Portfolio - Enhanced, R6	American Funds	20
Science & Technology Funds	3 Years	Firsthand Technology Opportunities Fund	Firsthand Capital Management, Inc.	37
Short Investment-Grade Debt Funds	3 Years	PIMCO Low Duration Income Fund, Institutional	PIMCO	91
Short Municipal Debt Funds	3 Years	Oppenheimer Short Term Municipal Fund, Y	OppenheimerFunds, Inc.	37
Short U.S. Government Funds	3 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	24
Short-Intermediate Investment-Grade Debt Funds	3 Years	Thompson Bond Fund	Thompson IM Funds	43
Short-Intermediate Municipal Debt Funds	3 Years	Eaton Vance Short Duration Municipal Opportunities Fund, I	Eaton Vance Management	22
Short-Intermediate U.S. Government Funds	3 Years	Eaton Vance Government Obligations Fund, I	Eaton Vance Management	10
Small-Cap Core Funds	3 Years	Thrivent Small Cap Stock Fund, S	Thrivent Mutual Funds	284
Small-Cap Growth Funds	3 Years	Virtus KAR Small-Cap Growth Fund, I	Virtus Investment Partners, Inc.	143
Small-Cap Value Funds	3 Years	Small Cap Value Fund, Inc.	Adams Asset Advisors, LLC	84
U.S. Mortgage Funds	3 Years	Voya Securitized Credit Fund, P	Voya Investments, LLC	34
Ultra-Short Obligation Funds	3 Years	PIMCO Short-Term Fund, Institutional	PIMCO	40
Utility Funds	3 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Company	14
Virginia Municipal Debt Funds	3 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	10

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Absolute Return Funds	5 Years	PIMCO Mortgage Opportunities and Bond Fund, Institutional	PIMCO	35
Alternative Credit Focus Funds	5 Years	Frost Credit Fund, Institutional	Frost Investment Advisors, LLC	36
Alternative Equity Market Neutral Funds	5 Years	Nuveen Equity Market Neutral Fund, I	Nuveen Fund Advisors, LLC	15
Alternative Event Driven Funds	5 Years	BlackRock Event Driven Equity Fund, Institutional	BlackRock, Inc.	13
Alternative Global Macro Funds	5 Years	KCM Macro Trends Fund, R-1	Kerns Capital Management, Inc.	57
Alternative Long/Short Equity Funds	5 Years	Natixis ASG Tactical U.S. Market Fund, A	AlphaSimplex Group, LLC	54
Alternative Managed Futures Funds	5 Years	Altegris Futures Evolution Strategy Fund, I	Altegris Advisors, LLC	18
Alternative Multi-Strategy Funds	5 Years	Franklin K2 Alternative Strategies Fund, R6	Franklin Templeton Investments	25
California Intermediate Municipal Debt Funds	5 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	16
California Municipal Debt Funds	5 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	32
China Region Funds	5 Years	Neuberger Berman Greater China Equity Fund, Institutional	Neuberger Berman Management, LLC	17
Commodities General Funds	5 Years	LoCorr Long/Short Commodities Strategy Fund, I	LoCorr Fund Management, LLC	24
Convertible Securities Funds	5 Years	Franklin Convertible Securities Fund, Advisor	Franklin Templeton Investments	14
Core Bond Funds	5 Years	Western Asset Core Bond Fund, IS	Legg Mason	112
Core Plus Bond Funds	5 Years	Morgan Stanley Institutional Core Plus Fixed Income Portfolio, I	Morgan Stanley Investment Management, Inc.	58
Corporate Debt A-Rated Funds	5 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	15
Corporate Debt BBB-Rated Funds	5 Years	Morgan Stanley Institutional Corporate Bond Portfolio, I	Morgan Stanley Investment Management, Inc.	58
Dedicated Short-Bias Funds	5 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	31
Emerging Markets Funds	5 Years	Fidelity Advisor Emerging Asia Fund, I	Fidelity Management & Research Company	165
Emerging Markets Hard Currency Debt Funds	5 Years	Fidelity Series Emerging Markets Debt Fund	Fidelity Management & Research Company	54
Emerging Markets Local Currency Debt Funds	5 Years	Eaton Vance Emerging Markets Debt Opportunities Fund, R6	Eaton Vance Management	15

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Energy MLP Funds	5 Years	Tortoise MLP & Pipeline Fund, Institutional	Tortoise Capital Advisors, LLC	18
Equity Income Funds	5 Years	Columbia Dividend Income Fund, I3	Columbia Threadneedle Investments	118
European Region Funds	5 Years	DFA Continental Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	19
Financial Services Funds	5 Years	RMB Mendon Financial Services Fund, A	RMB Capital Management	22
Flexible Income Funds	5 Years	First Trust Preferred Securities and Income Fund, I	First Trust Advisors, LP	15
Flexible Portfolio Funds	5 Years	Catalyst/Lyons Tactical Allocation Fund, A	Catalyst Funds	123
General & Insured Municipal Debt Funds	5 Years	Oppenheimer Rochester AMT-Free Municipal Fund, Y	OppenheimerFunds, Inc.	70
General Bond Funds	5 Years	PIMCO Long-Term Credit Fund, Institutional	PIMCO	17
General U.S. Government Funds	5 Years	PIMCO Long-Term U.S. Government Fund, Institutional	PIMCO	20
Global Equity Income Funds	5 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments	30
Global Income Funds	5 Years	JPMorgan Global Bond Opportunities, R6	J.P. Morgan Funds	40
Global Infrastructure Funds	5 Years	Lazard Global Listed Infrastructure Portfolio, Institutional	Lazard Asset Management, LLC	15
Global Large-Cap Core Funds	5 Years	JPMorgan Global Research Enhanced Index, I	J.P. Morgan Funds	12
Global Large-Cap Growth Funds	5 Years	Virtus Vontobel Global Opportunities Fund, I	Virtus Investment Partners, Inc.	23
Global Large-Cap Value Funds	5 Years	Dodge & Cox Global Stock Fund	Dodge & Cox	10
Global Multi-Cap Core Funds	5 Years	QS Global Equity Fund, I	Legg Mason	38
Global Multi-Cap Growth Funds	5 Years	Morgan Stanley Institutional Global Opportunity Portfolio, IS	Morgan Stanley Investment Management, Inc.	48
Global Multi-Cap Value Funds	5 Years	Fidelity Series Intrinsic Opportunistic Fund	Fidelity Management & Research Company	29
Global Natural Resources Funds	5 Years	GMO Resources Fund, IV	Grantham Mayo Van Otterloo & Company, LLC	24
Global Real Estate Funds	5 Years	MFS Global Real Estate Fund, R6	MFS Investment Management	33
Global Small-/Mid-Cap Funds	5 Years	Oppenheimer Global Opportunities Fund, I	OppenheimerFunds, Inc.	26



US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
GNMA Funds	5 Years	Vanguard GNMA Fund, Admiral	Vanguard Group, Inc.	13
Health/Biotechnology Funds	5 Years	Fidelity Select Medical Technology and Devices Portfolio	Fidelity Management & Research Company	23
High Yield Funds	5 Years	Diamond Hill Corporate Credit Fund, Y	Diamond Hill Capital Management, Inc.	136
High Yield Municipal Debt Funds	5 Years	Oppenheimer Rochester High Yield Municipal Fund, Y	OppenheimerFunds, Inc.	36
Industrials Funds	5 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	10
Inflation-Protected Bond Funds	5 Years	Wells Fargo Real Return Fund, Administrator	Wells Fargo Funds Management, LLC	44
Intermediate Municipal Debt Funds	5 Years	BlackRock Strategic Municipal Opportunities Fund, Institutional	BlackRock, Inc.	57
Intermediate U.S. Government Funds	5 Years	American Funds Mortgage Fund, R6	American Funds	12
International Equity Income Funds	5 Years	JPMorgan International Equity Income Fund, R5	J.P. Morgan Funds	14
International Income Funds	5 Years	Harvest Asian Bond Fund, Institutional	Harvest Global Investments Limited	26
International Large-Cap Core Funds	5 Years	T. Rowe Price Institutional International Core Equity Fund	T. Rowe Price Associates, Inc.	19
International Large-Cap Growth Funds	5 Years	Vanguard International Growth Fund, Admiral	Vanguard Group, Inc.	40
International Multi-Cap Core Funds	5 Years	PIMCO StocksPLUS International Fund (U.S. Dollar-Hedged), Institutional	PIMCO	78
International Multi-Cap Growth Funds	5 Years	Morgan Stanley Institutional International Advantage Portfolio, I	Morgan Stanley Investment Management, Inc.	110
International Multi-Cap Value Funds	5 Years	Hartford International Value Fund, Y	Hartford Funds	38
International Small/Mid-Cap Core Funds	5 Years	Fidelity Advisor International Small Cap Fund, I	Fidelity Management & Research Company	17
International Small/Mid-Cap Growth Funds	5 Years	Oppenheimer International Small-Mid Company Fund, I	OppenheimerFunds, Inc.	45
Large-Cap Core Funds	5 Years	Vanguard PRIMECAP Fund, Admiral	PRIMECAP Management Company	179
Large-Cap Growth Funds	5 Years	T. Rowe Price Institutional Large-Cap Growth Fund	T. Rowe Price Associates, Inc.	158
Large-Cap Value Funds	5 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Funds	100
Loan Participation Funds	5 Years	American Beacon Sound Point Floating Rate Income Fund, Institutional	American Beacon Advisors, Inc.	48

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Massachusetts Municipal Debt Funds	5 Years	Nuveen Massachusetts Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	12
Mid-Cap Core Funds	5 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	98
Mid-Cap Growth Funds	5 Years	BlackRock Mid-Cap Growth Equity Portfolio, Institutional	BlackRock, Inc.	94
Mid-Cap Value Funds	5 Years	Great-West Mid Cap Value Fund, Investor	GW Capital Management, LLC	40
Minnesota Municipal Debt Funds	5 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	12
Mixed-Asset Target 2010 Funds	5 Years	American Funds 2010 Target Date Retirement Fund, R6	American Funds	22
Mixed-Asset Target 2015 Funds	5 Years	Fidelity Freedom 2015 Fund	Fidelity Management & Research Company	22
Mixed-Asset Target 2020 Funds	5 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	36
Mixed-Asset Target 2025 Funds	5 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates, Inc.	37
Mixed-Asset Target 2030 Funds	5 Years	American Funds 2030 Target Date Retirement Fund, R6	American Funds	38
Mixed-Asset Target 2035 Funds	5 Years	American Funds 2035 Target Date Retirement Fund, R6	American Funds	35
Mixed-Asset Target 2040 Funds	5 Years	American Funds 2040 Target Date Retirement Fund, R6	American Funds	36
Mixed-Asset Target 2045 Funds	5 Years	American Funds 2045 Target Date Retirement Fund, R6	American Funds	35
Mixed-Asset Target 2050 Funds	5 Years	American Funds 2050 Target Date Retirement Fund, R6	American Funds	36
Mixed-Asset Target 2055+ Funds	5 Years	American Funds 2055 Target Date Retirement Fund, R6	American Funds	32
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	Thrivent Aggressive Allocation Fund, S	Thrivent Mutual Funds	34
Mixed-Asset Target Allocation Conservative Funds	5 Years	Wells Fargo Diversified Income Builder Fund, Institutional	Wells Fargo Funds Management, LLC	70
Mixed-Asset Target Allocation Growth Funds	5 Years	Wells Fargo Diversified Capital Builder Fund, I	Wells Fargo Funds Management, LLC	114
Mixed-Asset Target Allocation Moderate Funds	5 Years	Wells Fargo Index Asset Allocation Fund, Administrator	Wells Fargo Funds Management, LLC	123
Mixed-Asset Target Today Funds	5 Years	TIAA-CREF Lifecycle Retirement Income Fund, Institutional	TIAA Investments	26
Multi-Cap Core Funds	5 Years	AQR Large Cap Defensive Style Fund, I	AQR Capital Management, LLC	189

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Multi-Cap Growth Funds	5 Years	Morgan Stanley Multi Cap Growth Trust, IS	Morgan Stanley Investment Management, Inc.	132
Multi-Cap Value Funds	5 Years	Copley Fund	Copley Financial Services Corporation	102
Multi-Sector Income Funds	5 Years	Credit Suisse Strategic Income Fund, I	Credit Suisse Asset Management, LLC	67
Natural Resources Funds	5 Years	ICON Natural Resources Fund, S	Icon Funds	17
New Jersey Municipal Debt Funds	5 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	15
New York Intermediate Municipal Debt Funds	5 Years	Columbia AMT-Free New York Intermediate Muni Bond Fund, I	Columbia Threadneedle Investments	11
New York Municipal Debt Funds	5 Years	Oppenheimer Rochester Fund Municipals Fund, Y	OppenheimerFunds, Inc.	25
Ohio Municipal Debt Funds	5 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	10
Pacific Ex-Japan Funds	5 Years	Matthews Pacific Tiger Fund, Institutional	Matthews International Capital Management, LLC	14
Pennsylvania Municipal Debt Funds	5 Years	Oppenheimer Rochester Pennsylvania Municipal Fund, Y	OppenheimerFunds, Inc.	18
Precious Metals Equity Funds	5 Years	EuroPac Gold Fund, A	Euro Pacific Asset Management, LLC	18
Real Estate Funds	5 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management, Inc.	56
Retirement Income Funds	5 Years	Fidelity Advisor Managed Retirement 2025 Fund, I	Fidelity Management & Research Company	17
Science & Technology Funds	5 Years	Columbia Global Technology Growth Fund, I2	Columbia Threadneedle Investments	37
Short Investment-Grade Debt Funds	5 Years	Morgan Stanley Institutional Short Duration Income Portfolio, I	Morgan Stanley Investment Management, Inc.	73
Short Municipal Debt Funds	5 Years	Oppenheimer Short Term Municipal Fund, Y	OppenheimerFunds, Inc.	34
Short U.S. Government Funds	5 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	24
Short-Intermediate Investment-Grade Debt Funds	5 Years	Thompson Bond Fund	Thompson IM Funds	38
Short-Intermediate Municipal Debt Funds	5 Years	Eaton Vance Short Duration Municipal Opportunities Fund, I	Eaton Vance Management	20
Short-Intermediate U.S. Government Funds	5 Years	Eaton Vance Government Obligations Fund, I	Eaton Vance Management	10
Small-Cap Core Funds	5 Years	Thrivent Small Cap Stock Fund, S	Thrivent Mutual Funds	253

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Small-Cap Growth Funds	5 Years	Virtus KAR Small-Cap Growth Fund, I	Virtus Investment Partners, Inc.	133
Small-Cap Value Funds	5 Years	MFS New Discovery Value Fund, R6	MFS Investment Management	77
U.S. Mortgage Funds	5 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management, Inc.	29
Ultra-Short Obligation Funds	5 Years	PIMCO Short-Term Fund, Institutional	PIMCO	36
Utility Funds	5 Years	Vanguard Utilities Index Fund, Admiral	Vanguard Group, Inc.	14
Virginia Municipal Debt Funds	5 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	10
Alternative Credit Focus Funds	10 Years	AIG Flexible Credit Fund, A	SunAmerica Asset Management, LLC	14
Alternative Global Macro Funds	10 Years	RiverNorth Core Opportunity Fund, R	RiverNorth Capital Management, Inc.	23
Alternative Long/Short Equity Funds	10 Years	Guggenheim Alpha Opportunity Fund, Institutional	Guggenheim Investments	23
California Intermediate Municipal Debt Funds	10 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	14
California Municipal Debt Funds	10 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	30
China Region Funds	10 Years	Fidelity China Region Fund	Fidelity Management & Research Company	13
Convertible Securities Funds	10 Years	Franklin Convertible Securities Fund, Advisor	Franklin Templeton Investments	13
Core Bond Funds	10 Years	Putnam Income Fund, Y	Putnam Investment Management, LLC	97
Core Plus Bond Funds	10 Years	USAA Intermediate-Term Bond Fund, Institutional	USAA Asset Management Company	46
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	44
Dedicated Short-Bias Funds	10 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	30
Emerging Markets Funds	10 Years	Fidelity Advisor Emerging Asia Fund, I	Fidelity Management & Research Company	89
Emerging Markets Hard Currency Debt Funds	10 Years	GMO Emerging Country Debt Fund, IV	Grantham Mayo Van Otterloo & Company, LLC	22
Equity Income Funds	10 Years	BNY Mellon Income Stock Fund, M	Dreyfus Corporation	82

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
European Region Funds	10 Years	Invesco European Small Company Fund, Y	Invesco Funds	16
Financial Services Funds	10 Years	T. Rowe Price Financial Services Fund	T. Rowe Price Associates, Inc.	22
Flexible Portfolio Funds	10 Years	Loomis Sayles Global Allocation Fund, Y	Loomis Sayles & Company, LP	57
General & Insured Municipal Debt Funds	10 Years	Oppenheimer Rochester AMT-Free Municipal Fund, A	OppenheimerFunds, Inc.	62
General U.S. Government Funds	10 Years	PIMCO Long-Term U.S. Government Fund, Institutional	PIMCO	16
Global Equity Income Funds	10 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments	18
Global Income Funds	10 Years	Morgan Stanley Global Fixed Income Opportunities Fund, I	Morgan Stanley Investment Management, Inc.	29
Global Large-Cap Growth Funds	10 Years	GAMCO Global Growth Fund, I	Gabelli Funds, LLC	16
Global Multi-Cap Core Funds	10 Years	DFA Global Equity Portfolio, Institutional	Dimensional Fund Advisors, LP	23
Global Multi-Cap Growth Funds	10 Years	Morgan Stanley Institutional Global Opportunity Portfolio, I	Morgan Stanley Investment Management, Inc.	29
Global Multi-Cap Value Funds	10 Years	Polaris Global Value Fund	Polaris Capital Management, LLC	17
Global Natural Resources Funds	10 Years	T. Rowe Price New Era Fund	T. Rowe Price Associates, Inc.	20
Global Real Estate Funds	10 Years	Principal Global Real Estate Securities Fund, Institutional	Principal Global Investors, LLC	25
Global Small-/Mid-Cap Funds	10 Years	Seven Canyons World Innovators Fund, Investor	Seven Canyons Advisors, LLC	17
GNMA Funds	10 Years	PIMCO GNMA and Government Securities Fund, Institutional	PIMCO	13
Health/Biotechnology Funds	10 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	21
High Yield Funds	10 Years	Fidelity Advisor High Income Advantage Fund, I	Fidelity Management & Research Company	101
High Yield Municipal Debt Funds	10 Years	Nuveen High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	27
Inflation-Protected Bond Funds	10 Years	PIMCO Fixed Income Shares Series R	PIMCO	31
Intermediate Municipal Debt Funds	10 Years	Hartford Municipal Opportunities Fund, I	Hartford Funds	44
Intermediate U.S. Government Funds	10 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors, LP	10

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
International Income Funds	10 Years	Templeton Global Total Return Fund, Advisor	Franklin Templeton Investments	15
International Large-Cap Core Funds	10 Years	T Rowe Price Overseas Stock Fund	T. Rowe Price Associates, Inc.	15
International Large-Cap Growth Funds	10 Years	Vanguard International Growth Fund, Admiral	Vanguard Group, Inc.	34
International Multi-Cap Core Funds	10 Years	PIMCO StocksPLUS International Fund (U.S. Dollar-Hedged), Institutional	PIMCO	58
International Multi-Cap Growth Funds	10 Years	Fidelity International Capital Appreciation Fund	Fidelity Management & Research Company	88
International Multi-Cap Value Funds	10 Years	Hartford Schrodgers International Multi-Cap Value Fund, I	Hartford Funds	30
International Small/Mid-Cap Core Funds	10 Years	Schwab Fundamental International Small Company Index Fund	Charles Schwab Investment Management, Inc.	10
International Small/Mid-Cap Growth Funds	10 Years	Oppenheimer International Small-Mid Company Fund, Y	OppenheimerFunds, Inc.	33
Large-Cap Core Funds	10 Years	PIMCO StocksPLUS Absolute Return Fund, Institutional	PIMCO	151
Large-Cap Growth Funds	10 Years	Shelton NASDAQ-100 Index Fund, Direct	Shelton Capital Management	137
Large-Cap Value Funds	10 Years	Schwab Fundamental US Large Company Index Fund	Charles Schwab Investment Management, Inc.	88
Loan Participation Funds	10 Years	Eaton Vance Floating-Rate Advantage Fund, I	Eaton Vance Management	20
Massachusetts Municipal Debt Funds	10 Years	Eaton Vance Massachusetts Municipal Income Fund, I	Eaton Vance Management	12
Mid-Cap Core Funds	10 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	73
Mid-Cap Growth Funds	10 Years	T. Rowe Price Institutional Mid-Cap Equity Growth Fund	T. Rowe Price Associates, Inc.	84
Mid-Cap Value Funds	10 Years	Vanguard Mid-Cap Value Index Fund, Investor	Vanguard Group, Inc.	33
Minnesota Municipal Debt Funds	10 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	12
Mixed-Asset Target 2010 Funds	10 Years	T. Rowe Price Retirement 2010 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target 2015 Funds	10 Years	T. Rowe Price Retirement 2015 Fund	T. Rowe Price Associates, Inc.	12
Mixed-Asset Target 2020 Funds	10 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	23
Mixed-Asset Target 2025 Funds	10 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates, Inc.	17

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Mixed-Asset Target 2030 Funds	10 Years	T. Rowe Price Retirement 2030 Fund	T. Rowe Price Associates, Inc.	23
Mixed-Asset Target 2035 Funds	10 Years	T. Rowe Price Retirement 2035 Fund	T. Rowe Price Associates, Inc.	17
Mixed-Asset Target 2040 Funds	10 Years	T. Rowe Price Retirement 2040 Fund	T. Rowe Price Associates, Inc.	23
Mixed-Asset Target 2045 Funds	10 Years	T. Rowe Price Retirement 2045 Fund	T. Rowe Price Associates, Inc.	16
Mixed-Asset Target 2050 Funds	10 Years	T. Rowe Price Retirement 2050 Fund	T. Rowe Price Associates, Inc.	20
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	Great-West Aggressive Profile Fund, Investor	GW Capital Management, LLC	30
Mixed-Asset Target Allocation Conservative Funds	10 Years	Wells Fargo Diversified Income Builder Fund, Institutional	Wells Fargo Funds Management, LLC	60
Mixed-Asset Target Allocation Growth Funds	10 Years	T. Rowe Price Capital Appreciation Fund	T. Rowe Price Associates, Inc.	99
Mixed-Asset Target Allocation Moderate Funds	10 Years	SEI Defensive Strategy Allocation Fund, F	SEI Group	106
Mixed-Asset Target Today Funds	10 Years	BlackRock LifePath Smart Beta Retirement Fund, K	BlackRock, Inc.	18
Multi-Cap Core Funds	10 Years	Pin Oak Equity Fund	Oak Associates, Ltd.	156
Multi-Cap Growth Funds	10 Years	Fidelity OTC Portfolio, K	Fidelity Management & Research Company	108
Multi-Cap Value Funds	10 Years	Hotchkis & Wiley Value Opportunities Fund, I	Hotchkis & Wiley Capital Management, LLC	87
Multi-Sector Income Funds	10 Years	PIMCO Income Fund, Institutional	PIMCO	39
Natural Resources Funds	10 Years	Fidelity Advisor Energy Fund, I	Fidelity Management & Research Company	15
New Jersey Municipal Debt Funds	10 Years	Eaton Vance New Jersey Municipal Income Fund, I	Eaton Vance Management	15
New York Intermediate Municipal Debt Funds	10 Years	Franklin New York Intermediate-Term Tax-Free Income Fund, A1	Franklin Templeton Investments	11
New York Municipal Debt Funds	10 Years	Oppenheimer Rochester Fund Municipals Fund, Y	OppenheimerFunds, Inc.	23
Ohio Municipal Debt Funds	10 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	10
Pacific Ex-Japan Funds	10 Years	Invesco Asia Pacific Growth Fund, Y	Invesco Funds	10
Pennsylvania Municipal Debt Funds	10 Years	Oppenheimer Rochester Pennsylvania Municipal Fund, A	OppenheimerFunds, Inc.	18

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Precious Metals Equity Funds	10 Years	VanEck International Investors Gold Fund, I	Van Eck Associates Corporation	16
Real Estate Funds	10 Years	Aberdeen Realty Income & Growth Fund, Institutional	Aberdeen Asset Management	44
Retirement Income Funds	10 Years	Fidelity Advisor Managed Retirement 2025 Fund, I	Fidelity Management & Research Company	17
Science & Technology Funds	10 Years	Red Oak Technology Select Fund	Oak Associates, Ltd.	36
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	Virtus Seix Short-Term Municipal Bond Fund, I	Virtus Investment Partners, Inc.	24
Short U.S. Government Funds	10 Years	Oppenheimer Limited-Term Government Fund, Y	OppenheimerFunds, Inc.	21
Short-Intermediate Investment-Grade Debt Funds	10 Years	Virtus Newfleet Multi-Sector Short Term Bond Fund, I	Virtus Investment Partners, Inc.	32
Short-Intermediate Municipal Debt Funds	10 Years	Invesco Limited Term Municipal Income Fund, A2	Invesco Funds	18
Short-Intermediate U.S. Government Funds	10 Years	Natixis Loomis Sayles Limited Term Government and Agency Fund, Y	Loomis Sayles & Company, LP	10
Small-Cap Core Funds	10 Years	PIMCO StocksPLUS Small Fund, Institutional	PIMCO	201
Small-Cap Growth Funds	10 Years	AB Small Cap Growth Portfolio, I	AllianceBernstein, LP	116
Small-Cap Value Funds	10 Years	Hotchkis & Wiley Small Cap Value Fund, I	Hotchkis & Wiley Capital Management, LLC	61
U.S. Mortgage Funds	10 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	25
Ultra-Short Obligation Funds	10 Years	PIMCO Short-Term Fund, Institutional	PIMCO	21
Utility Funds	10 Years	PGIM Jennison Utility Fund, Z	PGIM Investments, LLC	14
Virginia Municipal Debt Funds	10 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	10