



REFINITIV LIPPER FUND AWARDS

2021 WINNERS UNITED STATES

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	American Century Investment Management Inc
Equity	Small Company	Paradigm Capital Management Inc
Fixed Income	Large Company	Vanguard Group Inc
Fixed Income	Small Company	Carillon Tower Advisers Inc
Mixed Assets	Large Company	State Street Bank and Trust Company
Mixed Assets	Small Company	Manning & Napier Advisors LLC
Overall	Large Company	American Century Investment Management Inc
Overall	Small Company	Calvert Research and Management

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Bond Funds	3 Years	Columbia Mortgage Opportunities Fund, I3	Columbia Threadneedle Investments	21
Absolute Return Funds	3 Years	Spectrum Advisors Preferred Fund, Investor	Advisors Preferred LLC	46
Alternative Credit Focus Funds	3 Years	Wavelength Interest Rate Neutral Fund	Wavelength Capital Management LLC	34
Alternative Equity Market Neutral Funds	3 Years	Absolute Convertible Arbitrage Fund, Institutional	Absolute Investment Advisers LLC	19
Alternative Event Driven Funds	3 Years	Driehaus Event Driven Fund	Driehaus Capital Management LLC	17
Alternative Global Macro Funds	3 Years	GMO Special Opportunities Fund, VI	Grantham Mayo Van Otterloo & Co LLC	53
Alternative Long/Short Equity Funds	3 Years	RiverPark Long/Short Opportunity Fund, Institutional	RiverPark Advisors LLC	78
Alternative Managed Futures Funds	3 Years	LoCorr Macro Strategies Fund, I	LoCorr Fund Management LLC	26
Alternative Multi-Strategy Funds	3 Years	Astor Macro Alternative Fund, I	Astor Investment Management LLC	39
California Intermediate Municipal Debt Funds	3 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group Inc	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
California Municipal Debt Funds	3 Years	Invesco California Municipal Fund, Y	Invesco Funds	30
China Region Funds	3 Years	Matthews China Small Companies Fund, Institutional	Matthews International Capital Mgmt LLC	15
Commodities General Funds	3 Years	Parametric Commodity Strategy Fund, Institutional	Eaton Vance Management	27
Convertible Securities Funds	3 Years	AllianzGI Convertible Fund, Institutional	Allianz Global Investors	16
Core Bond Funds	3 Years	Carillon Reams Core Bond Fund, I	Carillon Tower Advisers Inc	130
Core Plus Bond Funds	3 Years	American Funds Strategic Bond Fund, R6	American Funds	61
Corporate Debt A-Rated Funds	3 Years	SEI Institutional Inv Long Duration Credit Fund, A	SEI Group	15
Corporate Debt BBB-Rated Funds	3 Years	PIMCO Extended Duration Fund, Institutional	PIMCO	57
Dedicated Short-Bias Funds	3 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	31
Emerging Markets Funds	3 Years	Fidelity Advisor Emerging Asia Fund, I	Fidelity Management & Research Company	182
Emerging Markets Hard Currency Debt Funds	3 Years	Vanguard Emerging Markets Bond Fund, Investor	Vanguard Group Inc	63
Emerging Markets Local Currency Debt Funds	3 Years	Eaton Vance Emerging Markets Debt Opportunities Fund, R6	Eaton Vance Management	16
Energy MLP Funds	3 Years	Transamerica MLP & Energy Income Fund, I2	Transamerica Asset Management Inc	24
Equity Income Funds	3 Years	Parnassus Core Equity Fund, Institutional	Parnassus Investments	119
European Region Funds	3 Years	Morgan Stanley Europe Opportunity Fund Inc, I	Morgan Stanley Investment Management Inc	17
Financial Services Funds	3 Years	Fidelity Select Brokerage and Investment Management Portfolio	Fidelity Management & Research Company	22
Flexible Income Funds	3 Years	PIMCO Preferred and Capital Securities Fund, Institutional	PIMCO	20
Flexible Portfolio Funds	3 Years	Columbia Thermostat Fund, I3	Columbia Threadneedle Investments	148
General & Insured Municipal Debt Funds	3 Years	Invesco AMT-Free Municipal Fund, Y	Invesco Funds	80
General Bond Funds	3 Years	PIMCO Long-Term Credit Bond Fund, Institutional	PIMCO	17
General U.S. Government Funds	3 Years	PIMCO Long-Term US Government Fund, Institutional	PIMCO	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
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	Guinness Atkinson Dividend Builder Fund	Guinness Atkinson Asset Management Inc	28
Global High Yield Funds	3 Years	HSBC Strategic Income Fund, I	HSBC Global Asset Management (USA) Inc	28
Global Income Funds	3 Years	Dodge & Cox Global Bond Fund	Dodge & Cox	42
Global Infrastructure Funds	3 Years	ClearBridge Global Infrastructure Income Fund, IS	Franklin Templeton Investments	18
Global Large-Cap Growth Funds	3 Years	Baillie Gifford Long Term Global Growth, 2	Baillie Gifford Overseas Ltd	42
Global Large-Cap Value Funds	3 Years	John Hancock Global Equity Fund, NAV	John Hancock Investment Management LLC	11
Global Multi-Cap Core Funds	3 Years	Nationwide Global Sustainable Equity Fund, R6	Nationwide Fund Advisors	42
Global Multi-Cap Growth Funds	3 Years	Baron Global Advantage Fund, Institutional	Baron Funds	45
Global Multi-Cap Value Funds	3 Years	Hartford Climate Opportunities Fund, R6	Hartford Mutual Funds	47
Global Natural Resources Funds	3 Years	GMO Resources, IV	Grantham Mayo Van Otterloo & Co LLC	14
Global Real Estate Funds	3 Years	PGIM Select Real Estate Fund, R6	PGIM Investments LLC	40
Global Small-/Mid-Cap Funds	3 Years	Wasatch Global Opportunities Fund, Institutional	Wasatch Advisors Inc	34
GNMA Funds	3 Years	PIMCO GNMA and Government Securities Fund, Institutional	PIMCO	13
Health/Biotechnology Funds	3 Years	Eventide Healthcare & Life Sciences Fund, I	Eventide Asset Management LLC	22
High Yield Funds	3 Years	Diamond Hill High Yield Fund, Y	Diamond Hill Capital Management Inc	110
High Yield Municipal Debt Funds	3 Years	Invesco Rochester Municipal Opportunities Fund, Y	Invesco Funds	47
Inflation-Protected Bond Funds	3 Years	DFA LTIP Portfolio, Institutional	Dimensional Fund Advisors LP	44
Intermediate Municipal Debt Funds	3 Years	Hartford Municipal Opportunities Fund, F	Hartford Mutual Funds	59
Intermediate U.S. Government Funds	3 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors LP	12
International Equity Income Funds	3 Years	Vanguard International Dividend Appreciation Index Fund, Admiral	Vanguard Group Inc	18

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Income Funds	3 Years	PGIM International Bond Fund, R6	PGIM Investments LLC	30
International Large-Cap Core Funds	3 Years	Touchstone International ESG Equity Fund, Y	Touchstone Advisors Inc	26
International Large-Cap Growth Funds	3 Years	Vanguard International Growth Fund, Admiral	Vanguard Group Inc	58
International Large-Cap Value Funds	3 Years	Fidelity Series International Value Fund	Fidelity Management & Research Company	13
International Multi-Cap Core Funds	3 Years	Calvert International Responsible Index Fund, I	Calvert Research and Management	104
International Multi-Cap Growth Funds	3 Years	Morgan Stanley Institutional International Opportunity Port, I	Morgan Stanley Investment Management Inc	101
International Multi-Cap Value Funds	3 Years	Transamerica International Equity, R6	Transamerica Asset Management Inc	48
International Small/Mid-Cap Core Funds	3 Years	Vaughan Nelson International Small Cap Fund, Institutional	Vaughan Nelson Investment Mgmt LP	14
International Small/Mid-Cap Growth Funds	3 Years	WCM International Small Cap Growth Fund, Institutional	WCM Investment Management	55
Large-Cap Core Funds	3 Years	Pioneer Fund, Y	Amundi Pioneer Asset Management Inc	165
Large-Cap Growth Funds	3 Years	Touchstone Sands Capital Select Growth Fund, Y	Touchstone Advisors Inc	162
Large-Cap Value Funds	3 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Funds	89
Loan Participation Funds	3 Years	Victory Floating Rate Fund, Y	Victory Capital Management Inc	55
Massachusetts Municipal Debt Funds	3 Years	Vanguard Massachusetts Tax-Exempt Fund, Investor	Vanguard Group Inc	11
Mid-Cap Core Funds	3 Years	Destinations Small-Mid Cap Equity Fund, I	Brinker Capital Inc	90
Mid-Cap Growth Funds	3 Years	Morgan Stanley Institutional Discovery Portfolio, IS	Morgan Stanley Investment Management Inc	101
Mid-Cap Value Funds	3 Years	Columbia Select Mid Cap Value Fund, I3	Columbia Threadneedle Investments	34
Minnesota Municipal Debt Funds	3 Years	Columbia Minnesota Tax-Exempt Fund, I3	Columbia Threadneedle Investments	12
Mixed-Asset Target 2010 Funds	3 Years	TIAA-CREF Lifecycle Index 2010 Fund, Institutional	Nuveen	24
Mixed-Asset Target 2015 Funds	3 Years	Natixis Sustainable Future 2015 Fund, N	Natixis Advisors LP	28
Mixed-Asset Target 2020 Funds	3 Years	Natixis Sustainable Future 2020 Fund, N	Natixis Advisors LP	39

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2025 Funds	3 Years	DFA Dimensional 2025 Target Date Retirement Income Fund, Institutional	Dimensional Fund Advisors LP	47
Mixed-Asset Target 2030 Funds	3 Years	DFA Dimensional 2030 Target Date Retirement Income Fund, Institutional	Dimensional Fund Advisors LP	49
Mixed-Asset Target 2035 Funds	3 Years	American Funds 2035 Target Date Retirement Fund, R6	American Funds	46
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	45
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	American Funds 2055 Target Date Retirement Fund, R6	American Funds	45
Mixed-Asset Target 2060 Funds	3 Years	American Funds 2060 Target Date Retirement Fund, R6	American Funds	40
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	FundX Upgrader Fund	FundX Investment Group LLC	36
Mixed-Asset Target Allocation Conservative Funds	3 Years	MFS Conservative Allocation Fund, R4	MFS Investment Management	69
Mixed-Asset Target Allocation Growth Funds	3 Years	1919 Socially Responsive Balanced Fund, I	1919 Investment Counsel, LLC	119
Mixed-Asset Target Allocation Moderate Funds	3 Years	Janus Henderson Balanced Fund, D	Janus Capital Management LLC	125
Mixed-Asset Target Today Funds	3 Years	BlackRock LifePath Dynamic Retirement Fund, K	BlackRock Inc	33
Multi-Cap Core Funds	3 Years	Janus Henderson Contrarian Fund, N	Janus Capital Management LLC	183
Multi-Cap Growth Funds	3 Years	Morgan Stanley Insight Fund, I	Morgan Stanley Investment Management Inc	136
Multi-Cap Value Funds	3 Years	Cambiar Opportunity Fund, Institutional	Cambiar Investors LLC	155
Multi-Sector Income Funds	3 Years	BrandywineGLOBAL - Flexible Bond Fund, IS	Franklin Templeton Investments	87
Natural Resources Funds	3 Years	ICON Natural Resources Fund, Institutional	Shelton Capital Management	16
New Jersey Municipal Debt Funds	3 Years	Invesco New Jersey Municipal Fund, Y	Invesco Funds	15
New York Intermediate Municipal Debt Funds	3 Years	Eaton Vance New York Municipal Opportunities Fund, I	Eaton Vance Management	12
New York Municipal Debt Funds	3 Years	Invesco Rochester New York Municipals, Y	Invesco Funds	24

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Options Arbitrage/Option Strategies Funds	3 Years	CBOE Vest S&P 500 Enhanced Growth Strategy Fund, Institutional	CBOE Vest Financial LLC	10
Pacific Ex-Japan Funds	3 Years	Morgan Stanley Asia Opportunity Portfolio, IS	Morgan Stanley Investment Management Inc	13
Pennsylvania Municipal Debt Funds	3 Years	Invesco Pennsylvania Municipal Fund, Y	Invesco Funds	16
Precious Metals Equity Funds	3 Years	OCM Gold Fund, Advisor	Orrell Capital Management Inc	17
Real Estate Funds	3 Years	Dunham Real Estate Stock Fund, N	Dunham & Associates Invest Counsel Inc	59
Real Return Funds	3 Years	DWS RREEF Real Assets Fund, R6	DWS Investment Management Americas Inc	17
Retirement Income Funds	3 Years	Fidelity Managed Retirement 2025 Fund	Fidelity Management & Research Company	20
Science & Technology Funds	3 Years	Fidelity Advisor Technology Fund, I	Fidelity Management & Research Company	38
Short High Yield Funds	3 Years	PGIM Short Duration High Yield Income Fund, R6	PGIM Investments LLC	16
Short Investment-Grade Debt Funds	3 Years	Nationwide Loomis Short Term Bond Fund, R6	Nationwide Fund Advisors	92
Short Municipal Debt Funds	3 Years	Baird Short-Term Municipal Bond Fund, Institutional	Baird Funds	40
Short U.S. Government Funds	3 Years	Vanguard Short-Term Federal Fund, Admiral	Vanguard Group Inc	18
Short-Intermediate Investment-Grade Debt Funds	3 Years	Johnson Institutional Intermediate Bond Fund, I	Johnson Investment Counsel Inc	42
Short-Intermediate Municipal Debt Funds	3 Years	Old Westbury Municipal Bond Fund	Bessemer Investment Management LLC	22
Short-Intermediate U.S. Government Funds	3 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company	10
Small-Cap Core Funds	3 Years	Needham Small Cap Growth Fund, Institutional	Needham Investment Management LLC	245
Small-Cap Growth Funds	3 Years	Morgan Stanley Inception Portfolio, IS	Morgan Stanley Investment Management Inc	181
Small-Cap Value Funds	3 Years	MFS New Discovery Value Fund, R6	MFS Investment Management	64
U.S. Mortgage Funds	3 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	32
Ultra-Short Obligation Funds	3 Years	T Rowe Price Ultra Short-Term Bond Fund, I	T. Rowe Price Associates Inc	47
Utility Funds	3 Years	Wells Fargo Utility & Telecommunications Fund, Institutional	Wells Fargo Funds Management LLC	13

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Bond Funds	5 Years	Columbia Mortgage Opportunities Fund, I2	Columbia Threadneedle Investments	20
Absolute Return Funds	5 Years	Spectrum Advisors Preferred Fund, Investor	Advisors Preferred LLC	39
Alternative Credit Focus Funds	5 Years	Navigator Tactical Fixed Income Fund, I	Clark Capital Management Group Inc	31
Alternative Equity Market Neutral Funds	5 Years	Gateway Fund, Y	Gateway Investment Advisers LLC	15
Alternative Event Driven Funds	5 Years	AQR Diversified Arbitrage Fund, R6	AQR Capital Management LLC	14
Alternative Global Macro Funds	5 Years	GMO Special Opportunities Fund, VI	Grantham Mayo Van Otterloo & Co LLC	52
Alternative Long/Short Equity Funds	5 Years	RiverPark Long/Short Opportunity Fund, Institutional	RiverPark Advisors LLC	55
Alternative Managed Futures Funds	5 Years	LoCorr Macro Strategies Fund, I	LoCorr Fund Management LLC	21
Alternative Multi-Strategy Funds	5 Years	Astor Macro Alternative Fund, I	Astor Investment Management LLC	31
California Intermediate Municipal Debt Funds	5 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group Inc	17
California Municipal Debt Funds	5 Years	Invesco California Municipal Fund, Y	Invesco Funds	29
China Region Funds	5 Years	Matthews China Small Companies Fund, Investor	Matthews International Capital Mgmt LLC	15
Commodities General Funds	5 Years	Parametric Commodity Strategy Fund, Institutional	Eaton Vance Management	25
Convertible Securities Funds	5 Years	Lord Abbett Convertible Fund, R6	Lord Abbett & Co LLC	15
Core Bond Funds	5 Years	Carillon Reams Core Bond Fund, I	Carillon Tower Advisers Inc	115
Core Plus Bond Funds	5 Years	Carillon Reams Core Plus Bond Fund, I	Carillon Tower Advisers Inc	55
Corporate Debt A-Rated Funds	5 Years	SEI Institutional Inv Long Duration Credit Fund, A	SEI Group	15
Corporate Debt BBB-Rated Funds	5 Years	SEI Long Duration Fund, A	SEI Group	54
Dedicated Short-Bias Funds	5 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	30
Emerging Markets Funds	5 Years	Fidelity Advisor Emerging Asia Fund, I	Fidelity Management & Research Company	167
Emerging Markets Hard Currency Debt Funds	5 Years	Barings Emerging Markets Debt Blended Total Return Fund, I	Barings LLC	57

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Emerging Markets Local Currency Debt Funds	5 Years	Eaton Vance Emerging Markets Local Income Fund, I	Eaton Vance Management	16
Energy MLP Funds	5 Years	Transamerica MLP & Energy Income Fund, I2	Transamerica Asset Management Inc	21
Equity Income Funds	5 Years	Johnson Equity Income Fund	Johnson Investment Counsel Inc	107
European Region Funds	5 Years	Columbia Acorn European Fund, I2	Columbia Threadneedle Investments	17
Financial Services Funds	5 Years	Hennessy Large Cap Financial Fund, Institutional	Hennessy Funds	22
Flexible Income Funds	5 Years	PIMCO Preferred and Capital Securities Fund, Institutional	PIMCO	16
Flexible Portfolio Funds	5 Years	Calamos Growth & Income Fund, I	Calamos Advisors LLC	121
General & Insured Municipal Debt Funds	5 Years	Invesco AMT-Free Municipal Fund, Y	Invesco Funds	79
General Bond Funds	5 Years	PIMCO Long-Term Credit Bond Fund, Institutional	PIMCO	16
General U.S. Government Funds	5 Years	PIMCO Long-Term US Government Fund, Institutional	PIMCO	17
General U.S. Treasury Funds	5 Years	Vanguard Extended Duration Treasury Index Fund, Institutional Plus	Vanguard Group Inc	11
Global Equity Income Funds	5 Years	Guinness Atkinson Dividend Builder Fund	Guinness Atkinson Asset Management Inc	26
Global High Yield Funds	5 Years	T Rowe Price Global High Income Bond Fund, I	T. Rowe Price Associates Inc	28
Global Income Funds	5 Years	Dodge & Cox Global Bond Fund	Dodge & Cox	40
Global Infrastructure Funds	5 Years	MainStay CBRE Global Infrastructure Fund, I	MainStay Funds	15
Global Large-Cap Growth Funds	5 Years	Baillie Gifford Long Term Global Growth, 2	Baillie Gifford Overseas Ltd	34
Global Large-Cap Value Funds	5 Years	John Hancock Global Equity Fund, NAV	John Hancock Investment Management LLC	10
Global Multi-Cap Core Funds	5 Years	Nationwide Global Sustainable Equity Fund, R6	Nationwide Fund Advisors	37
Global Multi-Cap Growth Funds	5 Years	Baron Global Advantage Fund, Institutional	Baron Funds	37
Global Multi-Cap Value Funds	5 Years	Fidelity Series Intrinsic Opportunistic Fund	Fidelity Management & Research Company	39
Global Natural Resources Funds	5 Years	GMO Resources, IV	Grantham Mayo Van Otterloo & Co LLC	13

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global Real Estate Funds	5 Years	Janus Henderson Global Real Estate Fund, I	Janus Capital Management LLC	36
Global Small-/Mid-Cap Funds	5 Years	Wasatch Global Opportunities Fund, Investor	Wasatch Advisors Inc	26
GNMA Funds	5 Years	PIMCO GNMA and Government Securities Fund, Institutional	PIMCO	13
Health/Biotechnology Funds	5 Years	Fidelity Select Medical Technology and Devices Portfolio	Fidelity Management & Research Company	22
High Yield Funds	5 Years	Victory High Yield Fund, Y	Victory Capital Management Inc	102
High Yield Municipal Debt Funds	5 Years	Invesco Rochester Municipal Opportunities Fund, Y	Invesco Funds	43
Inflation-Protected Bond Funds	5 Years	PIMCO Long-Term Real Return Fund, Institutional	PIMCO	40
Intermediate Municipal Debt Funds	5 Years	BBH Intermediate Municipal Bond Fund, I	Brown Brothers Harriman	55
Intermediate U.S. Government Funds	5 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors LP	12
International Equity Income Funds	5 Years	Matthews Asia Dividend Fund, Institutional	Matthews International Capital Mgmt LLC	14
International Income Funds	5 Years	Harvest Asian Bond Fund, Institutional	Harvest Global Investments Limited	25
International Large-Cap Core Funds	5 Years	MassMutual Select Overseas Fund, I	MML Investment Advisers LLC	23
International Large-Cap Growth Funds	5 Years	Vanguard International Growth Fund, Admiral	Vanguard Group Inc	53
International Large-Cap Value Funds	5 Years	Putnam International Value Fund, R6	Putnam Investment Management LLC	13
International Multi-Cap Core Funds	5 Years	Knights of Columbus International Equity Fund, I	Knights of Columbus Asset Adv LLC	93
International Multi-Cap Growth Funds	5 Years	Morgan Stanley Institutional International Opportunity Port, I	Morgan Stanley Investment Management Inc	88
International Multi-Cap Value Funds	5 Years	Schwab Fundamental International Large Company Index Fund	Charles Schwab Investment Management Inc	43
International Small/Mid-Cap Core Funds	5 Years	Vaughan Nelson International Small Cap Fund, Institutional	Vaughan Nelson Investment Mgmt LP	14
International Small/Mid-Cap Growth Funds	5 Years	WCM International Small Cap Growth Fund, Institutional	WCM Investment Management	48
Large-Cap Core Funds	5 Years	Pioneer Fund, Y	Amundi Pioneer Asset Management Inc	152
Large-Cap Growth Funds	5 Years	JPMorgan Large Cap Growth Fund, R6	JPMorgan Funds	155

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Large-Cap Value Funds	5 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Funds	86
Loan Participation Funds	5 Years	Victory Floating Rate Fund, Y	Victory Capital Management Inc	51
Massachusetts Municipal Debt Funds	5 Years	Vanguard Massachusetts Tax-Exempt Fund, Investor	Vanguard Group Inc	11
Mid-Cap Core Funds	5 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Asset Management	81
Mid-Cap Growth Funds	5 Years	Morgan Stanley Institutional Discovery Portfolio, IS	Morgan Stanley Investment Management Inc	97
Mid-Cap Value Funds	5 Years	Heartland Mid Cap Value Fund, Institutional	Heartland Advisors Inc	32
Minnesota Municipal Debt Funds	5 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen	11
Mixed-Asset Target 2010 Funds	5 Years	T Rowe Price Retirement I 2010 Fund, I	T. Rowe Price Associates Inc	21
Mixed-Asset Target 2015 Funds	5 Years	T Rowe Price Retirement I 2015 Fund, I	T. Rowe Price Associates Inc	24
Mixed-Asset Target 2020 Funds	5 Years	T Rowe Price Retirement I 2020 Fund, I	T. Rowe Price Associates Inc	31
Mixed-Asset Target 2025 Funds	5 Years	T Rowe Price Retirement I 2025 Fund, I	T. Rowe Price Associates Inc	41
Mixed-Asset Target 2030 Funds	5 Years	State Street Target Retirement 2030 Fund, K	State Street Bank and Trust Company	42
Mixed-Asset Target 2035 Funds	5 Years	American Funds 2035 Target Date Retirement Fund, R6	American Funds	40
Mixed-Asset Target 2040 Funds	5 Years	American Funds 2040 Target Date Retirement Fund, R6	American Funds	40
Mixed-Asset Target 2045 Funds	5 Years	American Funds 2045 Target Date Retirement Fund, R6	American Funds	39
Mixed-Asset Target 2050 Funds	5 Years	American Funds 2050 Target Date Retirement Fund, R6	American Funds	40
Mixed-Asset Target 2055+ Funds	5 Years	American Funds 2055 Target Date Retirement Fund, R6	American Funds	38
Mixed-Asset Target 2060 Funds	5 Years	American Funds 2060 Target Date Retirement Fund, R6	American Funds	23
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	FundX Upgrader Fund	FundX Investment Group LLC	34
Mixed-Asset Target Allocation Conservative Funds	5 Years	MFS Conservative Allocation Fund, R4	MFS Investment Management	66
Mixed-Asset Target Allocation Growth Funds	5 Years	Wisconsin Plumb Balanced Fund, Investor	Wisconsin Capital Management LLC	113

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target Allocation Moderate Funds	5 Years	Janus Henderson Balanced Fund, N	Janus Capital Management LLC	123
Mixed-Asset Target Today Funds	5 Years	PIMCO RealPath Blend Income Fund, Institutional	PIMCO	31
Multi-Cap Core Funds	5 Years	Calvert US Large Cap Core Responsible Index, I	Calvert Research and Management	169
Multi-Cap Growth Funds	5 Years	Morgan Stanley Insight Fund, IS	Morgan Stanley Investment Management Inc	125
Multi-Cap Value Funds	5 Years	Monongahela All Cap Value Fund	Rodgers Brothers Inc	140
Multi-Sector Income Funds	5 Years	Hartford Strategic Income Fund, R6	Hartford Mutual Funds	79
Natural Resources Funds	5 Years	ICON Natural Resources Fund, Institutional	Shelton Capital Management	15
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	BNY Mellon New York Intermediate Tax-Exempt Bond Fund, M	BNY Mellon Investment Management	12
New York Municipal Debt Funds	5 Years	Invesco Rochester New York Municipals, Y	Invesco Funds	24
Pacific Ex-Japan Funds	5 Years	Matthews Asia Innovators Fund, Institutional	Matthews International Capital Mgmt LLC	12
Pennsylvania Municipal Debt Funds	5 Years	Invesco Pennsylvania Municipal Fund, Y	Invesco Funds	16
Precious Metals Equity Funds	5 Years	OCM Gold Fund, Advisor	Orrell Capital Management Inc	17
Real Estate Funds	5 Years	Altegris/AACA Opportunistic Real Estate Fund, I	Altegris Advisors LLC	56
Real Return Funds	5 Years	DWS RREEF Real Assets Fund, R6	DWS Investment Management Americas Inc	15
Retirement Income Funds	5 Years	Fidelity Managed Retirement 2025 Fund	Fidelity Management & Research Company	18
Science & Technology Funds	5 Years	Fidelity Advisor Technology Fund, I	Fidelity Management & Research Company	37
Short High Yield Funds	5 Years	Oakhurst Short Duration High Yield Credit Fund, Institutional	Oakhurst Advisors LLC	14
Short Investment-Grade Debt Funds	5 Years	PIMCO Low Duration Income Fund, Institutional	PIMCO	87
Short Municipal Debt Funds	5 Years	Baird Short-Term Municipal Bond Fund, Institutional	Baird Funds	36
Short U.S. Government Funds	5 Years	Vanguard Short-Term Federal Fund, Admiral	Vanguard Group Inc	18

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Short-Intermediate Investment-Grade Debt Funds	5 Years	Johnson Institutional Intermediate Bond Fund, I	Johnson Investment Counsel Inc	41
Short-Intermediate Municipal Debt Funds	5 Years	Wells Fargo Strategic Municipal Bond Fund, I	Wells Fargo Funds Management LLC	22
Short-Intermediate U.S. Government Funds	5 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company	10
Small-Cap Core Funds	5 Years	Needham Small Cap Growth Fund, Retail	Needham Investment Management LLC	235
Small-Cap Growth Funds	5 Years	Wasatch Ultra Growth Fund, Investor	Wasatch Advisors Inc	169
Small-Cap Value Funds	5 Years	PIMCO RAE PLUS Small Fund, Institutional	PIMCO	62
U.S. Mortgage Funds	5 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management Inc	31
Ultra-Short Obligation Funds	5 Years	T Rowe Price Ultra Short-Term Bond Fund	T. Rowe Price Associates Inc	39
Utility Funds	5 Years	Wells Fargo Utility & Telecommunications Fund, Institutional	Wells Fargo Funds Management LLC	13
Absolute Return Funds	10 Years	Salient Tactical Growth Fund, Institutional	Salient Partners LP	11
Alternative Global Macro Funds	10 Years	Columbia Global Opportunities Fund, I	Columbia Threadneedle Investments	31
Alternative Long/Short Equity Funds	10 Years	ICON Equity Fund, Institutional	Shelton Capital Management	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	27
China Region Funds	10 Years	Fidelity China Region Fund	Fidelity Management & Research Company	13
Commodities General Funds	10 Years	ALPS/CoreCommodity Management CompleteCommodities Strategy Fund, I	ALPS Advisors Inc	12
Convertible Securities Funds	10 Years	AllianzGI Convertible Fund, Institutional	Allianz Global Investors	12
Core Bond Funds	10 Years	Vanguard Intermediate-Term Investment-Grade Fund, Admiral	Vanguard Group Inc	100
Core Plus Bond Funds	10 Years	Morgan Stanley Institutional Core Plus Fixed Income Port, I	Morgan Stanley Investment Management Inc	48
Corporate Debt A-Rated Funds	10 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group Inc	12
Corporate Debt BBB-Rated Funds	10 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	46

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
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	96
Emerging Markets Hard Currency Debt Funds	10 Years	GMO Emerging Country Debt Fund, IV	Grantham Mayo Van Otterloo & Co LLC	24
Equity Income Funds	10 Years	Parnassus Core Equity Fund, Institutional	Parnassus Investments	73
European Region Funds	10 Years	Fidelity Nordic Fund	Fidelity Management & Research Company	15
Financial Services Funds	10 Years	1919 Financial Services Fund, I	1919 Investment Counsel, LLC	21
Flexible Income Funds	10 Years	Cohen & Steers Preferred Securities & Income Fund, I	Cohen & Steers Capital Management Inc	10
Flexible Portfolio Funds	10 Years	UBS US Allocation Fund, P	UBS Global Asset Management	61
General & Insured Municipal Debt Funds	10 Years	Invesco AMT-Free Municipal Fund, Y	Invesco Funds	63
General Bond Funds	10 Years	PIMCO Long-Term Credit Bond Fund, Institutional	PIMCO	11
General U.S. Government Funds	10 Years	PIMCO Long-Term US Government Fund, Institutional	PIMCO	15
General U.S. Treasury Funds	10 Years	Vanguard Extended Duration Treasury Index Fund, Institutional	Vanguard Group Inc	10
Global Equity Income Funds	10 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments Inc	15
Global High Yield Funds	10 Years	PIMCO High Yield Spectrum Fund, Institutional	PIMCO	15
Global Income Funds	10 Years	Morgan Stanley Global Fixed Income Opportunities Fund, I	Morgan Stanley Investment Management Inc	31
Global Large-Cap Growth Funds	10 Years	Gabelli Global Growth Fund, I	Gabelli Funds LLC	23
Global Multi-Cap Core Funds	10 Years	QS Global Equity Fund, I	Franklin Templeton Investments	23
Global Multi-Cap Growth Funds	10 Years	T Rowe Price Global Stock Fund	T. Rowe Price Associates Inc	24
Global Multi-Cap Value Funds	10 Years	Polaris Global Value Fund	Polaris Capital Management LLC	26
Global Natural Resources Funds	10 Years	T Rowe Price New Era Fund	T. Rowe Price Associates Inc	11
Global Real Estate Funds	10 Years	MFS Global Real Estate Fund, I	MFS Investment Management	26

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global Small-/Mid-Cap Funds	10 Years	American Funds SMALLCAP World Fund, R6	American Funds	16
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	20
High Yield Funds	10 Years	Loomis Sayles High Income Opportunities Fund, Institutional	Loomis Sayles & Company LP	89
High Yield Municipal Debt Funds	10 Years	Invesco Rochester Municipal Opportunities Fund, Y	Invesco Funds	31
Inflation-Protected Bond Funds	10 Years	PIMCO Long-Term Real Return Fund, Institutional	PIMCO	31
Intermediate Municipal Debt Funds	10 Years	Parametric TABS 5-to-15 Year Laddered Municipal Bond Fund, I	Eaton Vance Management	44
Intermediate U.S. Government Funds	10 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors LP	12
International Income Funds	10 Years	PIMCO International Bond Fund (US Dollar-Hedged), Institutional	PIMCO	18
International Large-Cap Core Funds	10 Years	MassMutual Select Overseas Fund, I	MML Investment Advisers LLC	20
International Large-Cap Growth Funds	10 Years	Vanguard International Growth Fund, Admiral	Vanguard Group Inc	42
International Large-Cap Value Funds	10 Years	Putnam International Value Fund, Y	Putnam Investment Management LLC	13
International Multi-Cap Core Funds	10 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged), Institutional	PIMCO	62
International Multi-Cap Growth Funds	10 Years	MFS International Intrinsic Value Fund, R6	MFS Investment Management	71
International Multi-Cap Value Funds	10 Years	Oakmark International Fund, Investor	Oakmark Family of Funds	30
International Small/Mid-Cap Core Funds	10 Years	Fidelity Advisor International Small Cap Fund, I	Fidelity Management & Research Company	10
International Small/Mid-Cap Growth Funds	10 Years	Oberweis International Opportunities Fund, Investor	Oberweis Asset Management Inc	30
Large-Cap Core Funds	10 Years	Vanguard FTSE Social Index Fund, Institutional	Vanguard Group Inc	130
Large-Cap Growth Funds	10 Years	Shelton NASDAQ-100 Index Fund, Direct	Shelton Capital Management	143
Large-Cap Value Funds	10 Years	JPMorgan US Value Fund, I	JPMorgan Funds	75
Loan Participation Funds	10 Years	Eaton Vance Floating-Rate Advantage Fund, I	Eaton Vance Management	24

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Massachusetts Municipal Debt Funds	10 Years	Eaton Vance Massachusetts Municipal Income Fund, I	Eaton Vance Management	11
Mid-Cap Core Funds	10 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Asset Management	62
Mid-Cap Growth Funds	10 Years	Eventide Gilead Fund, I	Eventide Asset Management LLC	88
Mid-Cap Value Funds	10 Years	Vanguard Mid-Cap Value Index Fund, Investor	Vanguard Group Inc	26
Minnesota Municipal Debt Funds	10 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen	11
Mixed-Asset Target 2010 Funds	10 Years	TIAA-CREF Lifecycle 2010 Fund, Institutional	Nuveen	15
Mixed-Asset Target 2015 Funds	10 Years	T Rowe Price Retirement 2015 Fund	T. Rowe Price Associates Inc	15
Mixed-Asset Target 2020 Funds	10 Years	T Rowe Price Retirement 2020 Fund	T. Rowe Price Associates Inc	17
Mixed-Asset Target 2025 Funds	10 Years	American Funds 2025 Target Date Retirement Fund, R6	American Funds	24
Mixed-Asset Target 2030 Funds	10 Years	American Funds 2030 Target Date Retirement Fund, R6	American Funds	23
Mixed-Asset Target 2035 Funds	10 Years	American Funds 2035 Target Date Retirement Fund, R6	American Funds	24
Mixed-Asset Target 2040 Funds	10 Years	American Funds 2040 Target Date Retirement Fund, R6	American Funds	23
Mixed-Asset Target 2045 Funds	10 Years	American Funds 2045 Target Date Retirement Fund, R6	American Funds	23
Mixed-Asset Target 2050 Funds	10 Years	American Funds 2050 Target Date Retirement Fund, R6	American Funds	20
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	Franklin Corefolio Allocation Fund, Advisor	Franklin Templeton Investments	28
Mixed-Asset Target Allocation Conservative Funds	10 Years	Vanguard Wellesley Income Fund, Admiral	Vanguard Group Inc	53
Mixed-Asset Target Allocation Growth Funds	10 Years	T Rowe Price Capital Appreciation Fund	T. Rowe Price Associates Inc	95
Mixed-Asset Target Allocation Moderate Funds	10 Years	Wells Fargo Index Asset Allocation Fund, Admn	Wells Fargo Funds Management LLC	108
Mixed-Asset Target Today Funds	10 Years	American Century One Choice In Retirement Portfolio, I	American Century Investment Management Inc	20
Multi-Cap Core Funds	10 Years	Calvert US Large Cap Core Responsible Index, I	Calvert Research and Management	140
Multi-Cap Growth Funds	10 Years	Fidelity Advisor Growth Opportunities Fund, I	Fidelity Management & Research Company	97

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Multi-Cap Value Funds	10 Years	JPMorgan Large Cap Value Fund, R6	JPMorgan Funds	121
Multi-Sector Income Funds	10 Years	PIMCO Income Fund, Institutional	PIMCO	42
Natural Resources Funds	10 Years	ICON Natural Resources Fund, Institutional	Shelton Capital Management	14
New Jersey Municipal Debt Funds	10 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund, Admiral	Vanguard Group Inc	15
New York Intermediate Municipal Debt Funds	10 Years	Franklin New York Intermediate-Term Tax-Free Income Fund, Advisor	Franklin Templeton Investments	10
New York Municipal Debt Funds	10 Years	Invesco Rochester New York Municipals, Y	Invesco Funds	23
Pacific Ex-Japan Funds	10 Years	Matthews Asia Innovators Fund, Investor	Matthews International Capital Mgmt LLC	11
Pennsylvania Municipal Debt Funds	10 Years	Invesco Pennsylvania Municipal Fund, Y	Invesco Funds	16
Precious Metals Equity Funds	10 Years	OCM Gold Fund, Advisor	Orrell Capital Management Inc	15
Real Estate Funds	10 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management Inc	45
Retirement Income Funds	10 Years	Fidelity Advisor Managed Retirement 2025 Fund, I	Fidelity Management & Research Company	15
Science & Technology Funds	10 Years	Columbia Global Technology Growth Fund, I	Columbia Threadneedle Investments	36
Short Investment-Grade Debt Funds	10 Years	PIMCO Low Duration Income Fund, Institutional	PIMCO	65
Short Municipal Debt Funds	10 Years	Virtus Seix Short-Term Municipal Bond Fund, I	Virtus Investment Partners	28
Short U.S. Government Funds	10 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	17
Short-Intermediate Investment-Grade Debt Funds	10 Years	Thornburg Limited Term Income Fund, I	Thornburg Investment Management Inc	32
Short-Intermediate Municipal Debt Funds	10 Years	Wells Fargo Strategic Municipal Bond Fund, Administrator	Wells Fargo Funds Management LLC	18
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	185
Small-Cap Growth Funds	10 Years	JPMorgan Small Cap Growth Fund, R6	JPMorgan Funds	139
Small-Cap Value Funds	10 Years	DFA Tax-Managed US Targeted Value Portfolio, Institutional	Dimensional Fund Advisors LP	50

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
U.S. Mortgage Funds	10 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management Inc	25
Ultra-Short Obligation Funds	10 Years	PIMCO Short-Term Fund, Institutional	PIMCO	25
Utility Funds	10 Years	PGIM Jennison Utility Fund, Z	PGIM Investments LLC	13