



REFINITIV LIPPER FUND AWARDS

2022 WINNERS UNITED STATES

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	JP Morgan Investment Management Inc
Equity	Small Company	Needham Investment Management LLC
Fixed Income	Large Company	Nuveen
Fixed Income	Small Company	Carillon Tower Advisers Inc
Mixed Assets	Large Company	Lord Abbett & Co LLC
Mixed Assets	Small Company	Virtus Investment Advisers Inc
Overall	Large Company	T. Rowe Price Associates Inc
Overall	Small Company	Calamos Advisors LLC

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Bond Funds	3 Years	Columbia Mortgage Opportunities Fund, I3	Columbia Management Inv Advisers LLC	21
Absolute Return Funds	3 Years	Spectrum Advisors Preferred Fund, Investor	Advisors Preferred LLC	40
Alternative Credit Focus Funds	3 Years	Western Asset Macro Opportunities Fund, IS	Legg Mason Partners Fund Advisor LLC	29
Alternative Equity Market Neutral Funds	3 Years	American Beacon SSI Alternative Income Fund, Y	American Beacon Advisers Inc	14
Alternative Event Driven Funds	3 Years	Driehaus Event Driven Fund	Driehaus Capital Management LLC	16
Alternative Global Macro Funds	3 Years	Permanent Portfolio, I	Pacific Heights Asset Management LLC	48
Alternative Long/Short Equity Funds	3 Years	RiverPark Long/Short Opportunity Fund, Institutional	RiverPark Advisers LLC	75
Alternative Managed Futures Funds	3 Years	ABR 50/50 Volatility Fund, Institutional	ABR Dynamic Funds LLC	21
Alternative Multi-Strategy Funds	3 Years	Abbey Capital Multi Asset Fund, I	Abbey Capital Limited	40
California Intermediate Municipal Debt Funds	3 Years	Payden California Muni Social Impact Fund, Investor	Payden & Rygel	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
California Municipal Debt Funds	3 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen	30
China Region Funds	3 Years	Matthews China Small Companies Fund, Institutional	Matthews International Capital Management LLC	16
Commodities General Funds	3 Years	AQR Risk-Balanced Commodities Strategy Fund, R6	AQR Capital Management LLC	24
Convertible Securities Funds	3 Years	Lord Abbett Convertible Fund, F3	Lord Abbett & Co LLC	15
Core Bond Funds	3 Years	Fidelity Flex Core Bond Fund	Fidelity Management & Research Company LLC	135
Core Plus Bond Funds	3 Years	American Funds Strategic Bond Fund, R6	Capital Research & Management Company	68
Corporate Debt A-Rated Funds	3 Years	SEI Institutional Investments Trust Long Duration Credit Fund	SEI Investments Management Corporation	13
Corporate Debt BBB-Rated Funds	3 Years	T Rowe Price Institutional Long Duration Credit Fund	T. Rowe Price Associates Inc	56
Dedicated Short-Bias Funds	3 Years	Rydex Inverse Mid-Cap Strategy Fund, H	Security Investors LLC	31
Emerging Markets Funds	3 Years	Wasatch Emerging Markets Select Fund, Institutional	Wasatch Advisors Inc	185
Emerging Markets Hard Currency Debt Funds	3 Years	Vanguard Emerging Markets Bond Fund, Admiral	Vanguard Group Inc	62
Emerging Markets Local Currency Debt Funds	3 Years	Eaton Vance Emerging Markets Debt Opportunities Fund, R6	Eaton Vance Management	17
Energy MLP Funds	3 Years	Invesco SteelPath MLP Income Fund, R6	Invesco Advisers Inc	23
Equity Income Funds	3 Years	Eventide Dividend Opportunities Fund, I	Eventide Asset Management LLC	114
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 LLC	21
Flexible Income Funds	3 Years	Virtus AllianzGI Preferred Securities and Income Fund, R6	Virtus Investment Advisers Inc	21
Flexible Portfolio Funds	3 Years	Quantified STF Fund, Investor	Advisors Preferred LLC	147
General & Insured Municipal Debt Funds	3 Years	Invesco AMT-Free Municipal Fund, Y	Invesco Advisers Inc	85
General Bond Funds	3 Years	PIMCO Long-Term Credit Bond Fund, Institutional	PIMCO	24
General U.S. Government Funds	3 Years	PIMCO Long-Term US Government Fund, Institutional	PIMCO	16

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	Eaton Vance Tax-Managed Global Dividend Income Fund, I	Eaton Vance Management	26
Global High Yield Funds	3 Years	BrandywineGLOBAL - Global High Yield Fund, IS	Legg Mason Partners Fund Advisor LLC	24
Global Income Funds	3 Years	Dodge & Cox Global Bond Fund	Dodge & Cox	49
Global Infrastructure Funds	3 Years	ClearBridge Global Infrastructure Income Fund, IS	Legg Mason Partners Fund Advisor LLC	21
Global Large-Cap Core Funds	3 Years	Northern Global Sustainability Index Fund, I	Northern Trust Investments Inc	13
Global Large-Cap Growth Funds	3 Years	Baillie Gifford Long Term Global Growth, 2	Baillie Gifford Overseas Ltd	44
Global Multi-Cap Core Funds	3 Years	Pax Global Environmental Markets Fund, Institutional	Impax Asset Management LLC	43
Global Multi-Cap Growth Funds	3 Years	Baillie Gifford Positive Change Equities Fund, K	Baillie Gifford Overseas Ltd	36
Global Multi-Cap Value Funds	3 Years	Hartford Climate Opportunities Fund, R6	Hartford Funds Management Company LLC	47
Global Natural Resources Funds	3 Years	GMO Resources, IV	Grantham Mayo Van Otterloo & Co LLC	15
Global Real Estate Funds	3 Years	TCW Global Real Estate Fund, I	TCW Investment Management Company LLC	39
Global Small-/Mid-Cap Funds	3 Years	Oberweis Global Opportunities Fund, Institutional	Oberweis Asset Management Inc	37
GNMA Funds	3 Years	PIMCO GNMA & Government Securities Fund, Institutional	PIMCO	13
Health/Biotechnology Funds	3 Years	Baron Health Care Fund, R6	BAMCO Inc	23
High Yield Funds	3 Years	Fidelity Capital & Income Fund	Fidelity Management & Research Company LLC	113
High Yield Municipal Debt Funds	3 Years	Invesco Rochester Municipal Opportunities Fund, Y	Invesco Advisers Inc	48
Inflation-Protected Bond Funds	3 Years	PIMCO Long-Term Real Return Fund, Institutional	PIMCO	44
Intermediate Municipal Debt Funds	3 Years	Segall Bryant & Hamill Municipal Opportunities Fund, Institutional	Segall Bryant & Hamill	59
Intermediate U.S. Government Funds	3 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors LP	13
International Equity Income Funds	3 Years	Vanguard International Dividend Appreciation Index Fund, Admiral	Vanguard Group Inc	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Income Funds	3 Years	Fidelity Series International Credit Fund	Fidelity Management & Research Company LLC	26
International Large-Cap Core Funds	3 Years	Fidelity Series Canada Fund	Fidelity Management & Research Company LLC	28
International Large-Cap Growth Funds	3 Years	Baillie Gifford International Concentrated Growth Equities Fund, K	Baillie Gifford Overseas Ltd	67
International Large-Cap Value Funds	3 Years	Fidelity Series International Value Fund	Fidelity Management & Research Company LLC	16
International Multi-Cap Core Funds	3 Years	Dunham International Stock Fund, N	Dunham & Associates Invest Counsel Inc	95
International Multi-Cap Growth Funds	3 Years	Alger International Focus Fund, Z	Fred Alger Management LLC	86
International Multi-Cap Value Funds	3 Years	Kopernik International Fund, I	Kopernik Global Investors LLC	49
International Small/Mid-Cap Core Funds	3 Years	Oakmark International Small Cap Fund, Institutional	Harris Associates LP	12
International Small/Mid-Cap Growth Funds	3 Years	WCM International Small Cap Growth Fund, Institutional	WCM Investment Management	57
International Small/Mid-Cap Value Funds	3 Years	DFA International Vector Equity Portfolio, Institutional	Dimensional Fund Advisors LP	10
Large-Cap Core Funds	3 Years	Meehan Focus Fund	Edgemoor Investment Advisors, Inc	154
Large-Cap Growth Funds	3 Years	Fidelity Blue Chip Growth K6 Fund	Fidelity Management & Research Company LLC	167
Large-Cap Value Funds	3 Years	Vanguard Windsor II Fund, Admiral	Aristotle Capital Management LLC	80
Loan Participation Funds	3 Years	Victory Floating Rate Fund, Y	Victory Capital Management Inc	53
Massachusetts Municipal Debt Funds	3 Years	Vanguard Massachusetts Tax-Exempt Fund, Investor	Vanguard Group Inc	11
Mid-Cap Core Funds	3 Years	Paradigm Select Fund	Paradigm Capital Management Inc	79
Mid-Cap Growth Funds	3 Years	Virtus AllianzGI Mid-Cap Growth Fund, Institutional	Virtus Investment Advisers Inc	88
Mid-Cap Value Funds	3 Years	Fidelity Advisor Value Fund, Z	Fidelity Management & Research Company LLC	45
Minnesota Municipal Debt Funds	3 Years	Delaware Minnesota High-Yield Muni Bond Fund, Institutional	Delaware Management Company	12
Mixed-Asset Target 2010 Funds	3 Years	T Rowe Price Retirement I 2010 Fund, I	T. Rowe Price Associates Inc	28
Mixed-Asset Target 2015 Funds	3 Years	T Rowe Price Retirement I 2015 Fund, I	T. Rowe Price Associates Inc	29

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2020 Funds	3 Years	DFA Dimensional 2020 Target Date Retirement Income Fund, Institutional	Dimensional Fund Advisors LP	39
Mixed-Asset Target 2025 Funds	3 Years	DFA Dimensional 2025 Target Date Retirement Income Fund, Institutional	Dimensional Fund Advisors LP	48
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	Fidelity Advisor Freedom Blend 2035 Fund, Z6	Fidelity Management & Research Company LLC	48
Mixed-Asset Target 2040 Funds	3 Years	Fidelity Advisor Freedom Blend 2040 Fund, Z6	Fidelity Management & Research Company LLC	48
Mixed-Asset Target 2045 Funds	3 Years	T Rowe Price Retirement I 2045 Fund, I	T. Rowe Price Associates Inc	47
Mixed-Asset Target 2050 Funds	3 Years	T Rowe Price Retirement I 2050 Fund, I	T. Rowe Price Associates Inc	47
Mixed-Asset Target 2055+ Funds	3 Years	T Rowe Price Retirement I 2055 Fund, I	T. Rowe Price Associates Inc	47
Mixed-Asset Target 2060 Funds	3 Years	T Rowe Price Target 2060 Fund, I	T. Rowe Price Associates Inc	43
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	GuidePath Growth Allocation Fund, Institutional	AssetMark Inc	37
Mixed-Asset Target Allocation Conservative Funds	3 Years	TCW Conservative Allocation Fund, I	TCW Investment Management Company LLC	68
Mixed-Asset Target Allocation Growth Funds	3 Years	Fidelity Balanced Fund, K	Fidelity Management & Research Company LLC	113
Mixed-Asset Target Allocation Moderate Funds	3 Years	Virtus Tactical Allocation Fund, A	Virtus Investment Advisers Inc	130
Mixed-Asset Target Today Funds	3 Years	PIMCO RealPath Blend Income Fund, Institutional	PIMCO	34
Multi-Cap Core Funds	3 Years	Needham Growth Fund, Institutional	Needham Investment Management LLC	177
Multi-Cap Growth Funds	3 Years	Baron Partners Fund, Institutional	BAMCO Inc	123
Multi-Cap Value Funds	3 Years	Parnassus Endeavor Fund, Institutional	Parnassus Investments	178
Multi-Sector Income Funds	3 Years	MetWest Flexible Income Fund, I	Metropolitan West Asset Management LLC	88
Natural Resources Funds	3 Years	BNY Mellon Natural Resources Fund, Y	BNY Mellon Investment Adviser Inc	13
Natural Resources Funds	3 Years	Hennessy BP Energy Transition Fund, Institutional	Hennessy Advisors Inc	13
New Jersey Municipal Debt Funds	3 Years	Invesco New Jersey Municipal Fund, Y	Invesco Advisers Inc	15

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
New York Intermediate Municipal Debt Funds	3 Years	Western Asset Intermediate Maturity NY Municipals Fund, I	Legg Mason Partners Fund Advisor LLC	11
New York Municipal Debt Funds	3 Years	Invesco Rochester New York Municipals Fund, Y	Invesco Advisers Inc	25
Pacific Ex-Japan Funds	3 Years	Matthews Asia Innovators Fund, Institutional	Matthews International Capital Management LLC	10
Pennsylvania Municipal Debt Funds	3 Years	Invesco Pennsylvania Municipal Fund, Y	Invesco Advisers Inc	16
Precious Metals Equity Funds	3 Years	OCM Gold Fund, Advisor	Orrell Capital Management Inc	17
Real Estate Funds	3 Years	Baron Real Estate Income Fund, Institutional	BAMCO Inc	59
Real Return Funds	3 Years	T Rowe Price Real Assets Fund, I	T. Rowe Price Associates Inc	19
Retirement Income Funds	3 Years	Fidelity Managed Retirement 2025 Fund	Fidelity Management & Research Company LLC	20
Science & Technology Funds	3 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Company LLC	37
Short High Yield Funds	3 Years	Intrepid Income Fund, Institutional	Intrepid Capital Management Inc	15
Short Investment-Grade Debt Funds	3 Years	American Century Short Duration Strategic Income Fund, R6	American Century Investment Management Inc	93
Short Municipal Debt Funds	3 Years	Baird Short-Term Municipal Bond Fund, Institutional	Robert W Baird & Company Inc	41
Short U.S. Government Funds	3 Years	Vanguard Short-Term Federal Fund, Admiral	Vanguard Group Inc	17
Short-Intermediate Investment-Grade Debt Funds	3 Years	Channel Short Duration Income Fund	Channel Investment Partners LLC	41
Short-Intermediate Municipal Debt Funds	3 Years	Parametric TABS 1-to-10 Year Laddered Municipal Bond Fund, I	Eaton Vance Management	22
Short-Intermediate U.S. Government Funds	3 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company LLC	10
Small-Cap Core Funds	3 Years	Needham Small Cap Growth Fund, Institutional	Needham Investment Management LLC	234
Small-Cap Growth Funds	3 Years	Needham Aggressive Growth Fund, Institutional	Needham Investment Management LLC	191
Small-Cap Value Funds	3 Years	Bridgeway Small-Cap Value Fund	Bridgeway Capital Management LLC	60
U.S. Mortgage Funds	3 Years	Easterly Income Opportunities Fund; R6	Easterly Funds LLC	35
Ultra-Short Obligation Funds	3 Years	USAA Ultra Short-Term Bond Fund, R6	Victory Capital Management Inc	50

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Utility Funds	3 Years	MFS Utilities Fund, R6	MFS Investment Management	13
Absolute Return Bond Funds	5 Years	Columbia Mortgage Opportunities Fund, I2	Columbia Management Inv Advisers LLC	21
Absolute Return Funds	5 Years	Spectrum Advisors Preferred Fund, Investor	Advisors Preferred LLC	36
Alternative Credit Focus Funds	5 Years	Frost Credit Fund, Institutional	Frost Investment Advisors LLC	29
Alternative Equity Market Neutral Funds	5 Years	American Beacon SSI Alternative Income Fund, Y	American Beacon Advisors Inc	13
Alternative Event Driven Funds	5 Years	Camelot Event Driven Fund, Institutional	Camelot Event-Driven Advisors LLC	14
Alternative Global Macro Funds	5 Years	Delaware Ivy Asset Strategy Fund, N	Delaware Management Company	47
Alternative Long/Short Equity Funds	5 Years	RiverPark Long/Short Opportunity Fund, Institutional	RiverPark Advisors LLC	66
Alternative Managed Futures Funds	5 Years	PIMCO TRENDS Managed Futures Strategy Fund, Institutional	PIMCO	19
Alternative Multi-Strategy Funds	5 Years	SMI 50/40/10 Fund	SMI Advisory Services LLC	27
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	Nuveen California High Yield Municipal Bond Fund, I	Nuveen	30
China Region Funds	5 Years	Matthews China Small Companies Fund, Investor	Matthews International Capital Management LLC	15
Commodities General Funds	5 Years	Parametric Commodity Strategy Fund, Institutional	Eaton Vance Management	22
Convertible Securities Funds	5 Years	Virtus Convertible Fund, Institutional	Virtus Investment Advisers Inc	15
Core Bond Funds	5 Years	Fidelity Series Investment Grade Bond Fund	Fidelity Management & Research Company LLC	117
Core Plus Bond Funds	5 Years	American Funds Strategic Bond Fund, R6	Capital Research & Management Company	59
Corporate Debt A-Rated Funds	5 Years	SEI Institutional Investments Trust Long Duration Credit Fund	SEI Investments Management Corporation	13
Corporate Debt BBB-Rated Funds	5 Years	T Rowe Price Institutional Long Duration Credit Fund	T. Rowe Price Associates Inc	51
Dedicated Short-Bias Funds	5 Years	Rydex Inverse Mid-Cap Strategy Fund, H	Security Investors LLC	31
Emerging Markets Funds	5 Years	PGIM Jennison Emerging Markets Equity Opportunities Fund, Z	PGIM Investments LLC	163

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Emerging Markets Hard Currency Debt Funds	5 Years	Voya Emerging Markets Corporate Debt Fund, P	Voya Investments LLC	58
Emerging Markets Local Currency Debt Funds	5 Years	Eaton Vance Emerging Markets Debt Opportunities Fund, R6	Eaton Vance Management	17
Energy MLP Funds	5 Years	Invesco SteelPath MLP Income Fund, R6	Invesco Advisers Inc	21
Equity Income Funds	5 Years	Parnassus Core Equity Fund, Institutional	Parnassus Investments	108
European Region Funds	5 Years	Morgan Stanley Europe Opportunity Fund Inc, I	Morgan Stanley Investment Management Inc	17
Financial Services Funds	5 Years	Fidelity Select Brokerage and Investment Management Portfolio	Fidelity Management & Research Company LLC	21
Flexible Income Funds	5 Years	PIMCO Preferred and Capital Securities Fund, Institutional	PIMCO	18
Flexible Portfolio Funds	5 Years	Quantified STF Fund, Investor	Advisors Preferred LLC	130
General & Insured Municipal Debt Funds	5 Years	Invesco AMT-Free Municipal Fund, Y	Invesco Advisers Inc	80
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	16
General U.S. Treasury Funds	5 Years	Vanguard Extended Duration Treasury Index Fund, Institutional Plus	Vanguard Group Inc	13
Global Equity Income Funds	5 Years	Sit Global Dividend Growth Fund, I	Sit Investment Associates Inc	24
Global High Yield Funds	5 Years	T Rowe Price Global High Income Bond Fund, I	T. Rowe Price Associates Inc	24
Global Income Funds	5 Years	Dodge & Cox Global Bond Fund	Dodge & Cox	43
Global Infrastructure Funds	5 Years	ClearBridge Global Infrastructure Income Fund, IS	Legg Mason Partners Fund Advisor LLC	17
Global Large-Cap Core Funds	5 Years	Sit ESG Growth Fund, I	Sit Investment Associates Inc	11
Global Large-Cap Growth Funds	5 Years	Baillie Gifford Long Term Global Growth, 2	Baillie Gifford Overseas Ltd	40
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, R6	BAMCO Inc	28
Global Multi-Cap Value Funds	5 Years	Hartford Climate Opportunities Fund, R6	Hartford Funds Management Company LLC	41

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global Natural Resources Funds	5 Years	GMO Resources, IV	Grantham Mayo Van Otterloo & Co LLC	14
Global Real Estate Funds	5 Years	PGIM Select Real Estate Fund, R6	PGIM Investments LLC	37
Global Small-/Mid-Cap Funds	5 Years	Wasatch Global Opportunities Fund, Institutional	Wasatch Advisors Inc	29
GNMA Funds	5 Years	PIMCO GNMA & Government Securities Fund, Institutional	PIMCO	13
Health/Biotechnology Funds	5 Years	Fidelity Select Medical Technology and Devices Portfolio	Fidelity Management & Research Company LLC	22
High Yield Funds	5 Years	BrandywineGLOBAL - High Yield Fund, IS	Legg Mason Partners Fund Advisor LLC	105
High Yield Municipal Debt Funds	5 Years	Invesco Rochester Municipal Opportunities Fund, Y	Invesco Advisers Inc	43
Inflation-Protected Bond Funds	5 Years	PIMCO Long-Term Real Return Fund, Institutional	PIMCO	40
Intermediate Municipal Debt Funds	5 Years	Delaware Tax-Free USA Intermediate Fund, Institutional	Delaware Management Company	56
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	Vanguard International Dividend Appreciation Index Fund, Admiral	Vanguard Group Inc	16
International Income Funds	5 Years	Harvest Asian Bond Fund, Institutional	Harvest Global Investments Limited	23
International Large-Cap Core Funds	5 Years	MassMutual Overseas Fund, I	MML Investment Advisers LLC	26
International Large-Cap Growth Funds	5 Years	WCM Focused International Growth Fund, Institutional	WCM Investment Management	60
International Large-Cap Value Funds	5 Years	Fidelity Series International Value Fund	Fidelity Management & Research Company LLC	16
International Multi-Cap Core Funds	5 Years	Knights of Columbus International Equity Fund, I	Knights of Columbus Asset Adv LLC	84
International Multi-Cap Growth Funds	5 Years	Morgan Stanley Institutional International Advantage Port, I	Morgan Stanley Investment Management Inc	79
International Multi-Cap Value Funds	5 Years	Schwab Fundamental International Large Company Index Fund	Charles Schwab Investment Management Inc	45
International Small/Mid-Cap Core Funds	5 Years	DFA International Small Company Portfolio, Institutional	Dimensional Fund Advisors LP	11
International Small/Mid-Cap Growth Funds	5 Years	WCM International Small Cap Growth Fund, Institutional	WCM Investment Management	51
Large-Cap Core Funds	5 Years	Nationwide BNY Mellon Dynamic US Core Fund, R6	Nationwide Fund Advisors	141

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Large-Cap Growth Funds	5 Years	Fidelity Blue Chip Growth Fund, K	Fidelity Management & Research Company LLC	155
Large-Cap Value Funds	5 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Capital LP	78
Loan Participation Funds	5 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Company LLC	50
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 LLC	73
Mid-Cap Growth Funds	5 Years	Morgan Stanley Inst Discovery Portfolio, IS	Morgan Stanley Investment Management Inc	83
Mid-Cap Value Funds	5 Years	Columbia Select Mid Cap Value Fund, I3	Columbia Management Inv Advisers LLC	43
Minnesota Municipal Debt Funds	5 Years	Delaware Minnesota High-Yield Muni Bond Fund, Institutional	Delaware Management Company	11
Mixed-Asset Target 2010 Funds	5 Years	T Rowe Price Retirement I 2010 Fund, I	T. Rowe Price Associates Inc	22
Mixed-Asset Target 2015 Funds	5 Years	T Rowe Price Retirement I 2015 Fund, I	T. Rowe Price Associates Inc	23
Mixed-Asset Target 2020 Funds	5 Years	T Rowe Price Retirement I 2020 Fund, I	T. Rowe Price Associates Inc	30
Mixed-Asset Target 2025 Funds	5 Years	T Rowe Price Retirement I 2025 Fund, I	T. Rowe Price Associates Inc	40
Mixed-Asset Target 2030 Funds	5 Years	T Rowe Price Retirement I 2030 Fund, I	T. Rowe Price Associates Inc	41
Mixed-Asset Target 2035 Funds	5 Years	American Funds 2035 Target Date Retirement Fund, R6	Capital Research & Management Company	40
Mixed-Asset Target 2040 Funds	5 Years	American Funds 2040 Target Date Retirement Fund, R6	Capital Research & Management Company	39
Mixed-Asset Target 2045 Funds	5 Years	American Funds 2045 Target Date Retirement Fund, R6	Capital Research & Management Company	39
Mixed-Asset Target 2050 Funds	5 Years	American Funds 2050 Target Date Retirement Fund, R6	Capital Research & Management Company	39
Mixed-Asset Target 2055+ Funds	5 Years	American Funds 2055 Target Date Retirement Fund, R6	Capital Research & Management Company	38
Mixed-Asset Target 2060 Funds	5 Years	American Funds 2060 Target Date Retirement Fund, R6	Capital Research & Management Company	31
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	GuidePath Growth Allocation Fund, Institutional	AssetMark Inc	37
Mixed-Asset Target Allocation Conservative Funds	5 Years	MFS Conservative Allocation Fund, I	MFS Investment Management	67

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target Allocation Growth Funds	5 Years	Value Line Capital Appreciation Fund, Institutional	EULAV Asset Management	109
Mixed-Asset Target Allocation Moderate Funds	5 Years	Fidelity Advisor Balanced Fund, Z	Fidelity Management & Research Company LLC	122
Mixed-Asset Target Today Funds	5 Years	PIMCO RealPath Blend Income Fund, Institutional	PIMCO	30
Multi-Cap Core Funds	5 Years	Calvert US Large Cap Core Responsible Index, I	Calvert Research and Management	165
Multi-Cap Growth Funds	5 Years	Baron Opportunity Fund, R6	BAMCO Inc	118
Multi-Cap Value Funds	5 Years	Diamond Hill All Cap Select Fund, Y	Diamond Hill Capital Management Inc	167
Multi-Sector Income Funds	5 Years	River Canyon Total Return Bond Fund, Institutional	River Canyon Fund Management LLC	80
Natural Resources Funds	5 Years	BNY Mellon Natural Resources Fund, Y	BNY Mellon Investment Adviser Inc	13
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 Adviser Inc	11
New York Municipal Debt Funds	5 Years	Invesco Rochester New York Municipals Fund, Y	Invesco Advisers Inc	25
Pacific Ex-Japan Funds	5 Years	Matthews Asia Innovators Fund, Institutional	Matthews International Capital Management LLC	10
Pennsylvania Municipal Debt Funds	5 Years	Invesco Pennsylvania Municipal Fund, Y	Invesco Advisers Inc	16
Precious Metals Equity Funds	5 Years	OCM Gold Fund, Advisor	Orrell Capital Management Inc	17
Real Estate Funds	5 Years	PGIM US Real Estate Fund, Z	PGIM Investments LLC	55
Real Return Funds	5 Years	DWS RREEF Real Assets Fund, R6	DWS Investment Management Americas Inc	16
Retirement Income Funds	5 Years	Fidelity Advisor Managed Retirement 2025 Fund, I	Fidelity Management & Research Company LLC	18
Science & Technology Funds	5 Years	Fidelity Advisor Technology Fund, I	Fidelity Management & Research Company LLC	35
Short High Yield Funds	5 Years	PGIM Short Duration High Yield Income Fund, R6	PGIM Investments LLC	14
Short Investment-Grade Debt Funds	5 Years	PIMCO Low Duration Income Fund, Institutional	PIMCO	86
Short Municipal Debt Funds	5 Years	Baird Short-Term Municipal Bond Fund, Institutional	Robert W Baird & Company Inc	38

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Short U.S. Government Funds	5 Years	Vanguard Short-Term Federal Fund, Admiral	Vanguard Group Inc	17
Short-Intermediate Investment-Grade Debt Funds	5 Years	Catalyst Insider Income Fund, I	Catalyst Capital Advisors LLC	38
Short-Intermediate Municipal Debt Funds	5 Years	Parametric TABS 1-to-10 Year Laddered Municipal Bond Fund, I	Eaton Vance Management	22
Short-Intermediate U.S. Government Funds	5 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company LLC	10
Small-Cap Core Funds	5 Years	Needham Small Cap Growth Fund, Retail	Needham Investment Management LLC	225
Small-Cap Growth Funds	5 Years	Driehaus Micro Cap Growth Fund	Driehaus Capital Management LLC	179
Small-Cap Value Funds	5 Years	Bridgeway Small-Cap Value Fund	Bridgeway Capital Management LLC	59
U.S. Mortgage Funds	5 Years	Columbia Quality Income Fund, I3	Columbia Management Inv Advisers LLC	33
Ultra-Short Obligation Funds	5 Years	USAA Ultra Short-Term Bond Fund, Institutional	Victory Capital Management Inc	46
Utility Funds	5 Years	PGIM Jennison Utility Fund, Z	PGIM Investments LLC	13
Absolute Return Bond Funds	10 Years	MainStay MacKay Strategic Bond Fund, I	New York Life Investment Management LLC	13
Absolute Return Funds	10 Years	Cavanal Hill Opportunistic Fund, Institutional	Cavanal Hill Investment Management	14
Alternative Credit Focus Funds	10 Years	Guggenheim Macro Opportunities Fund, Institutional	Guggenheim Partners Investment Management LLC	10
Alternative Global Macro Funds	10 Years	RiverNorth Core Opportunity Fund, R	RiverNorth Capital Management Inc	37
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	15
California Municipal Debt Funds	10 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen	27
China Region Funds	10 Years	Fidelity Advisor China Region Fund, I	Fidelity Management & Research Company LLC	14
Commodities General Funds	10 Years	Parametric Commodity Strategy Fund, Institutional	Eaton Vance Management	15
Convertible Securities Funds	10 Years	Virtus Convertible Fund, Institutional	Virtus Investment Advisers Inc	13
Core Bond Funds	10 Years	BlackRock Total Return Fund, K	BlackRock Advisors LLC	103

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Core Plus Bond Funds	10 Years	Morgan Stanley Institutional Core Plus Fixed Income Port, I	Morgan Stanley Investment Management Inc	52
Corporate Debt A-Rated Funds	10 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Wellington Management Company LLP	11
Corporate Debt BBB-Rated Funds	10 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	45
Dedicated Short-Bias Funds	10 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFund Advisors LLC	30
Emerging Markets Funds	10 Years	Fidelity Advisor Emerging Asia Fund, I	Fidelity Management & Research Company LLC	117
Emerging Markets Hard Currency Debt Funds	10 Years	GMO Emerging Country Debt Fund, IV	Grantham Mayo Van Otterloo & Co LLC	32
Emerging Markets Local Currency Debt Funds	10 Years	Eaton Vance Emerging Markets Local Income Fund, I	Eaton Vance Management	12
Equity Income Funds	10 Years	Parnassus Core Equity Fund, Institutional	Parnassus Investments	78
European Region Funds	10 Years	Columbia Acorn European Fund, I	Columbia Wanger Asset Management LLC	16
Financial Services Funds	10 Years	T Rowe Price Financial Services Fund	T. Rowe Price Associates Inc	21
Flexible Income Funds	10 Years	Cohen & Steers Preferred Securities & Income Fund, I	Cohen & Steers Capital Management Inc	12
Flexible Portfolio Funds	10 Years	Kinetics Market Opportunities Fund, Institutional	Horizon Kinetics Asset Management LLC	69
General & Insured Municipal Debt Funds	10 Years	Invesco AMT-Free Municipal Fund, Y	Invesco Advisers Inc	65
General Bond Funds	10 Years	PIMCO Long-Term Credit Bond Fund, Institutional	PIMCO	12
General U.S. Government Funds	10 Years	PIMCO Long-Term US Government Fund, Institutional	PIMCO	16
General U.S. Treasury Funds	10 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group Inc	10
Global Equity Income Funds	10 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments Inc	14
Global High Yield Funds	10 Years	PIMCO High Yield Spectrum Fund, Institutional	PIMCO	16
Global Income Funds	10 Years	Western Asset SMASh Series Core Plus Completion Fund	Legg Mason Partners Fund Advisor LLC	36
Global Large-Cap Growth Funds	10 Years	Guinness Atkinson Global Innovators Fund, Investor	Guinness Atkinson Asset Management Inc	26
Global Multi-Cap Core Funds	10 Years	Pax Global Environmental Markets Fund, Institutional	Impax Asset Management LLC	28

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global Multi-Cap Growth Funds	10 Years	T Rowe Price Global Stock Fund	T. Rowe Price Associates Inc	17
Global Multi-Cap Value Funds	10 Years	Polaris Global Value Fund	Polaris Capital Management LLC	26
Global Natural Resources Funds	10 Years	BlackRock Natural Resources Trust, Institutional	BlackRock Advisors LLC	12
Global Real Estate Funds	10 Years	MFS Global Real Estate Fund, I	MFS Investment Management	28
Global Small-/Mid-Cap Funds	10 Years	Grandeur Peak Global Opportunities Fund, Institutional	Grandeur Peak Global Advisors LLC	18
GNMA Funds	10 Years	PIMCO GNMA & 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 Capital & Income Fund	Fidelity Management & Research Company LLC	90
High Yield Municipal Debt Funds	10 Years	Nuveen High Yield Municipal Bond Fund, I	Nuveen	31
Inflation-Protected Bond Funds	10 Years	PIMCO Fixed Income SHares Series R	PIMCO	30
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	American Funds Mortgage Fund, R6	Capital Research & Management Company	12
International Income Funds	10 Years	PIMCO Intl Bond Fund (US Dollar-Hedged), Institutional	PIMCO	18
International Large-Cap Core Funds	10 Years	MassMutual Overseas Fund, I	MML Investment Advisers LLC	23
International Large-Cap Growth Funds	10 Years	WCM Focused International Growth Fund, Institutional	WCM Investment Management	50
International Large-Cap Value Funds	10 Years	Fidelity Series International Value Fund	Fidelity Management & Research Company LLC	16
International Multi-Cap Core Funds	10 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged), Institutional	PIMCO	59
International Multi-Cap Growth Funds	10 Years	Morgan Stanley Institutional International Advantage Port, I	Morgan Stanley Investment Management Inc	63
International Multi-Cap Value Funds	10 Years	Hartford International Value Fund, Y	Hartford Funds Management Company LLC	33
International Small/Mid-Cap Growth Funds	10 Years	Invesco International Small-Mid Company Fund, Y	Invesco Advisers Inc	36
Large-Cap Core Funds	10 Years	Vanguard FTSE Social Index Fund, Institutional	Vanguard Group Inc	126

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Large-Cap Growth Funds	10 Years	USAA Nasdaq-100 Index Fund, Fund	Victory Capital Management Inc	140
Large-Cap Value Funds	10 Years	Fidelity Mega Cap Stock Fund	Fidelity Management & Research Company LLC	72
Loan Participation Funds	10 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Company LLC	36
Massachusetts Municipal Debt Funds	10 Years	Vanguard Massachusetts Tax-Exempt Fund, Investor	Vanguard Group Inc	11
Mid-Cap Core Funds	10 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Asset Management LLC	58
Mid-Cap Growth Funds	10 Years	T Rowe Price New Horizons Fund	T. Rowe Price Associates Inc	77
Mid-Cap Value Funds	10 Years	Ariel Fund, Investor	Ariel Investments LLC	38
Minnesota Municipal Debt Funds	10 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen	11
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	14
Mixed-Asset Target 2020 Funds	10 Years	T Rowe Price Retirement 2020 Fund	T. Rowe Price Associates Inc	16
Mixed-Asset Target 2025 Funds	10 Years	T Rowe Price Retirement 2025 Fund	T. Rowe Price Associates Inc	24
Mixed-Asset Target 2030 Funds	10 Years	American Funds 2030 Target Date Retirement Fund, R6	Capital Research & Management Company	23
Mixed-Asset Target 2035 Funds	10 Years	American Funds 2035 Target Date Retirement Fund, R6	Capital Research & Management Company	24
Mixed-Asset Target 2040 Funds	10 Years	American Funds 2040 Target Date Retirement Fund, R6	Capital Research & Management Company	23
Mixed-Asset Target 2045 Funds	10 Years	American Funds 2045 Target Date Retirement Fund, R6	Capital Research & Management Company	23
Mixed-Asset Target 2050 Funds	10 Years	American Funds 2050 Target Date Retirement Fund, R6	Capital Research & Management Company	22
Mixed-Asset Target 2055+ Funds	10 Years	American Funds 2055 Target Date Retirement Fund, R6	Capital Research & Management Company	16
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	JPMorgan Investor Growth Fund, I	JP Morgan Investment Management Inc	32
Mixed-Asset Target Allocation Conservative Funds	10 Years	Vanguard Wellesley Income Fund, Admiral	Wellington Management Company LLP	52
Mixed-Asset Target Allocation Growth Funds	10 Years	T Rowe Price Capital Appreciation Fund	T. Rowe Price Associates Inc	93

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target Allocation Moderate Funds	10 Years	Fidelity Advisor Balanced Fund, I	Fidelity Management & Research Company 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	132
Multi-Cap Growth Funds	10 Years	Fidelity Growth Company Fund, K	Fidelity Management & Research Company LLC	94
Multi-Cap Value Funds	10 Years	Diamond Hill All Cap Select Fund, I	Diamond Hill Capital Management Inc	140
Multi-Sector Income Funds	10 Years	Lord Abbett Bond Debenture Fund, I	Lord Abbett & Co LLC	47
Natural Resources Funds	10 Years	Fidelity Select Energy Portfolio	Fidelity Management & Research Company LLC	12
New Jersey Municipal Debt Funds	10 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund, Admiral	Vanguard Group Inc	15
New York Municipal Debt Funds	10 Years	Invesco Rochester New York Municipals Fund, Y	Invesco Advisers Inc	24
Pennsylvania Municipal Debt Funds	10 Years	Invesco Pennsylvania Municipal Fund, Y	Invesco Advisers Inc	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	47
Real Return Funds	10 Years	DWS RREEF Real Assets Fund, Institutional	DWS Investment Management Americas Inc	13
Retirement Income Funds	10 Years	Fidelity Advisor Managed Retirement 2025 Fund, I	Fidelity Management & Research Company LLC	15
Science & Technology Funds	10 Years	Columbia Global Technology Growth Fund, I	Columbia Management Inv Advisers LLC	34
Short Investment-Grade Debt Funds	10 Years	PIMCO Low Duration Income Fund, Institutional	PIMCO	67
Short Municipal Debt Funds	10 Years	Invesco Short Term Municipal Fund, Y	Invesco Advisers Inc	29
Short U.S. Government Funds	10 Years	Eaton Vance Short Duration Government Income Fund, I	Boston Management And Research	17
Short-Intermediate Investment-Grade Debt Funds	10 Years	Thornburg Limited Term Income Fund, I	Thornburg Investment Management Inc	30
Short-Intermediate Municipal Debt Funds	10 Years	Allspring Strategic Municipal Bond Fund, Ad	Allspring Funds Management LLC	18
Short-Intermediate U.S. Government Funds	10 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company LLC	10

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Small-Cap Core Funds	10 Years	Wasatch Small Cap Value Fund, Investor	Wasatch Advisors Inc	186
Small-Cap Growth Funds	10 Years	Wasatch Micro Cap Fund, Investor	Wasatch Advisors Inc	149
Small-Cap Value Funds	10 Years	PIMCO RAE PLUS Small Fund, Institutional	PIMCO	51
U.S. Mortgage Funds	10 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management Inc	27
Ultra-Short Obligation Funds	10 Years	PIMCO Short-Term Fund, Institutional	PIMCO	29
Utility Funds	10 Years	PGIM Jennison Utility Fund, Z	PGIM Investments LLC	13