

LSEG Lipper Fund Awards

UNITED STATES 2024

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	Dimensional
Equity	Small Company	Third Avenue Management
Fixed Income	Large Company	Invesco
Fixed Income	Small Company	Frost Investment Advisors
Mixed Assets	Large Company	PGIM Investments
Mixed Assets	Small Company	Mutual of America Financial
Overall	Large Company	Dimensional
Overall	Small Company	Putnam Investments

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Bond Funds	3 Years	PGIM Absolute Return Bond Fund; R6	PGIM Investments LLC	18
Absolute Return Funds	3 Years	AQR Style Premia Alternative Fund; R6	AQR Capital Management LLC	34
Alternative Credit Focus Funds	3 Years	PGIM Securitized Credit Fund; R6	PGIM Investments LLC	27
Alternative Equity Market Neutral Funds	3 Years	AQR Equity Market Neutral Fund; R6	AQR Capital Management LLC	12
Alternative Event Driven Funds	3 Years	Camelot Event-Driven Fund; Institutional	Camelot Event-Driven Advisors LLC	15
Alternative Global Macro Funds	3 Years	Permanent Portfolio; Institutional	Pacific Heights Asset Management LLC	36
Alternative Long/Short Equity Funds	3 Years	Invenomic Fund; Super Institutional	Invenomic Capital Management LP	73
Alternative Managed Futures Funds	3 Years	AQR Managed Futures Strategy HV Fund; R6	AQR Capital Management LLC	22
Alternative Multi-Strategy Funds	3 Years	AQR Diversifying Strategies Fund; R6	AQR Capital Management LLC	40
California Intermediate Municipal Debt Funds	3 Years	PIMCO California Muni Opportunistic Value Fund; Institutional	Pacific Investment Management Company LLC	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
California Municipal Debt Funds	3 Years	BlackRock California Municipal Opportunities Fund; K	BlackRock Advisors LLC	31
China Region Funds	3 Years	T Rowe Price China Evolution Equity Fund; Institutional	T. Rowe Price Associates Inc	20
Commodities General Funds	3 Years	PIMCO CommoditiesPLUS Strategy Fund; Institutional	Pacific Investment Management Company LLC	24
Convertible Securities Funds	3 Years	MainStay MacKay Convertible Fund; Institutional	New York Life Investment Management LLC	16
Core Bond Funds	3 Years	Putnam Core Bond Fund; R6	Putnam Investment Management LLC	128
Core Plus Bond Funds	3 Years	Weitz Core Plus Income Fund; Institutional	Weitz Investment Management Inc	65
Corporate Debt Funds A Rated	3 Years	Ave Maria Bond Fund	Schwartz Investment Counsel Inc	12
Corporate Debt Funds BBB-Rated	3 Years	Permanent Portfolio Versatile Bond Portfolio; Institutional	Pacific Heights Asset Management LLC	55
Dedicated Short Bias Funds	3 Years	Rydex Inverse Russell 2000 Strategy Fund; A	Security Investors LLC	28
Emerging Markets Funds	3 Years	PIMCO RAE Emerging Markets Fund; Institutional	Pacific Investment Management Company LLC	181
Emerging Markets Hard Currency Debt Funds	3 Years	DoubleLine Low Duration Emerging Markets Fixed Income; Institutional	DoubleLine Capital LP	55
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 Alpha Plus Fund; R6	Invesco Advisers Inc	22
Equity Income Funds	3 Years	Huber Select Large Cap Value Fund; Institutional	Huber Capital Management LLC	108
European Region Funds	3 Years	ProFunds Europe 30 ProFund; Investor	ProFund Advisors LLC	16
Financial Services Funds	3 Years	T Rowe Price Financial Services Fund; Institutional	T. Rowe Price Associates Inc	21
Flexible Income Funds	3 Years	North Square Preferred and Income Securities Fund; Institutional	North Square Investments LLC	23
Flexible Portfolio Funds	3 Years	Matisse Discounted Closed-End Fund Strategy; Institutional	Deschutes Portfolio Strategy LLC	135
General & Insured Municipal Debt Funds	3 Years	DFA Municipal Real Return Portfolio; Institutional	Dimensional Fund Advisors LP	88
General Bond Funds	3 Years	CM Advisors Fixed Income Fund	Van Den Berg Management I Inc	26
General U.S. Government Funds	3 Years	Sit US Government Securities: Y	Sit Investment Associates Inc	16

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
General U.S. Treasury Funds	3 Years	Vanguard Intermediate-Term Treasury Fund; Admiral	Vanguard Group Inc	15
Global Equity Income Funds	3 Years	Thornburg Income Builder Fund; R6	Thornburg Investment Management Inc	26
Global High Yield Funds	3 Years	American Beacon SiM High Yield Opportunities Fund; R5	American Beacon Advisors Inc	22
Global Income Funds	3 Years	DFA Two-Year Global Fixed Income Portfolio; Institutional	Dimensional Fund Advisors LP	55
Global Infrastructure Funds	3 Years	abrdrn Global Infrastructure Fund; Institutional	Abrdrn Inc	24
Global Large-Cap Core	3 Years	Northern Global Sustainability Index Fund;K	Northern Trust Corp	22
Global Large-Cap Growth	3 Years	Fisher Investments Institutional Group ESG Stock Fund for Retirement Plans	Fisher Asset Management LLC	44
Global Large-Cap Value	3 Years	Dodge & Cox Global Stock Fund; Institutional	Dodge & Cox	10
Global Multi-Cap Core	3 Years	Franklin Global Equity Fund; IS	Legg Mason Partners Fund Advisor LLC	38
Global Multi-Cap Growth	3 Years	MainStay Epoch Capital Growth Fund; Institutional	New York Life Investment Management LLC	32
Global Multi-Cap Value	3 Years	Vanguard Global Capital Cycles Fund; Investor	Wellington Management Company LLP	43
Global Natural Resources Funds	3 Years	Goehring & Rozenchwajg Resources Fund; Institutional	Goehring & Rozenchwajg Associates LLC	15
Global Real Estate Funds	3 Years	American Century Global Real Estate Fund;R6	American Century Investment Management Inc	36
Global Small-/Mid-Cap Funds	3 Years	Federated Hermes SDG Engagement Equity Fund; Institutional	Federated Global Investment Management Corp	37
GNMA Funds	3 Years	Victory Fund for Income; Institutional	Victory Capital Management Inc	13
Health/Biotechnology Funds	3 Years	Live Oak Health Sciences Fund	Oak Associates Ltd	25
High Yield Funds	3 Years	CrossingBridge Low Duration High Yield Fund; Institutional	CrossingBridge Advisors LLC	115
High Yield Municipal Debt Funds	3 Years	Nuveen Short Duration High Yield Municipal Bond; Institutional	Nuveen Fund Advisors LLC	47
Inflation Protected Bond Funds	3 Years	Eaton Vance Short Duration Inflation-Protected Income Fund; Institutional	Eaton Vance Management	39
Intermediate Municipal Debt Funds	3 Years	AB Municipal Bond Inflation Strategy; 2	AllianceBernstein LP	54
Intermediate U.S. Government Funds	3 Years	Victory Government Securities Fund; R6	Victory Capital Management Inc	13

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Equity Income Funds	3 Years	Goldman Sachs International Equity Income Fund; R6	Goldman Sachs Asset Management LP	17
International Income Funds	3 Years	Azzad Wise Capital Fund	Azzad Asset Management Inc	20
International Large-Cap Core	3 Years	Lazard International Equity Advantage Portfolio; Institutional	Lazard Asset Management LLC	55
International Large-Cap Growth	3 Years	Saturna Sextant International Fund; Z	Saturna Capital Corporation	74
International Large-Cap Value	3 Years	Artisan International Value Fund; Institutional	Artisan Partners LP	24
International Multi-Cap Core	3 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged); Institutional	Pacific Investment Management Company LLC	83
International Multi-Cap Growth	3 Years	Northern Active M International Equity Fund	Northern Trust Corp	54
International Multi-Cap Value	3 Years	Hartford International Value Fund; F	Hartford Funds Management Company LLC	57
International Small/Mid-Cap Core	3 Years	DFA International Small Company Portfolio; Institutional	Dimensional Fund Advisors LP	10
International Small/Mid-Cap Growth	3 Years	Invesco EQV International Small Company Fund; R6	Invesco Advisers Inc	51
International Small/Mid-Cap Value	3 Years	Brandes International Small Cap Equity Fund; R6	Brandes Investment Partners LP	14
Large-Cap Core Funds	3 Years	Pear Tree Quality Fund; Institutional	Pear Tree Advisors Inc	162
Large-Cap Growth Funds	3 Years	Baron Durable Advantage Fund; R6	BAMCO INC	163
Large-Cap Value Funds	3 Years	Invesco Comstock Fund; R6	Invesco Advisers Inc	71
Loan Participation Funds	3 Years	Franklin Floating Rate Daily Access Fund; R6	Franklin Advisers Inc	50
Massachusetts Municipal Debt Funds	3 Years	AB Massachusetts Portfolio; Advisor	AllianceBernstein LP	10
Mid-Cap Core Funds	3 Years	AMG River Road Mid Cap Value Fund; Z	AMG Funds LLC	93
Mid-Cap Growth Funds	3 Years	Value Line Mid Cap Focused Fund; Institutional	EULAV Asset Management	97
Mid-Cap Value Funds	3 Years	Hotchkis & Wiley Mid-Cap Value Fund; Z	Hotchkis and Wiley Capital Management LLC	31
Minnesota Municipal Debt Funds	3 Years	DFA Minnesota Municipal Bond Portfolio; Institutional	Dimensional Fund Advisors LP	12
Mixed-Asset Target 2010 Funds	3 Years	MassMutual Select T Rowe Price Retirement 2010 Fund;l	MML Investment Advisers LLC	26

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2015 Funds	3 Years	MassMutual Select T Rowe Price Retirement 2015 Fund;I	MML Investment Advisers LLC	26
Mixed-Asset Target 2020 Funds	3 Years	PGIM Target Date 2020 Fund;R6	PGIM Investments LLC	34
Mixed-Asset Target 2025 Funds	3 Years	MoA Clear Passage 2025 Fund	Mutual of America Capital Management LLC	45
Mixed-Asset Target 2030 Funds	3 Years	MoA Clear Passage 2030 Fund	Mutual of America Capital Management LLC	46
Mixed-Asset Target 2035 Funds	3 Years	MoA Clear Passage 2035 Fund	Mutual of America Capital Management LLC	45
Mixed-Asset Target 2040 Funds	3 Years	MoA Clear Passage 2040 Fund	Mutual of America Capital Management LLC	45
Mixed-Asset Target 2045 Funds	3 Years	MoA Clear Passage 2045 Fund	Mutual of America Capital Management LLC	44
Mixed-Asset Target 2050 Funds	3 Years	MoA Clear Passage 2050 Fund	Mutual of America Capital Management LLC	44
Mixed-Asset Target 2055 Funds	3 Years	Putnam RetirementAdvantage 2055 Fund; R6	Putnam Investment Management LLC	44
Mixed-Asset Target 2060 Funds	3 Years	Putnam RetirementAdvantage 2060 Fund; R6	Putnam Investment Management LLC	43
Mixed-Asset Target 2060+ Funds	3 Years	MoA Clear Passage 2065 Fund	Mutual of America Capital Management LLC	26
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	SEI Market Growth Strategy Allocation	SEI Investments Management Corp	39
Mixed-Asset Target Allocation Conservative Funds	3 Years	Federated Hermes Muni & Stock Advantage Fund; Institutional	Federated Global Investment Management Corp	76
Mixed-Asset Target Allocation Growth Funds	3 Years	Davis Appreciation & Income Fund; Y	Davis Selected Advisers LP	115
Mixed-Asset Target Allocation Moderate Funds	3 Years	Oakmark Equity and Income Fund; Institutional	Harris Associates LP	127
Mixed-Asset Target Today Funds	3 Years	Victory Target Retirement Income Fund	Victory Capital Management Inc	31
Multi-Cap Core Funds	3 Years	Northern Large Cap Core Fund	Northern Trust Corp	182
Multi-Cap Growth Funds	3 Years	TANAKA Growth Fund; R	Tanaka Capital Management Inc	105
Multi-Cap Value Funds	3 Years	Muhlenkamp Fund	Muhlenkamp & Company Inc	178
Multi-Sector Income Funds	3 Years	Credit Suisse Strategic Income Fund; Institutional	Credit Suisse Asset Management LLC	96
Natural Resources Funds	3 Years	Fidelity Advisor Energy Fund; Z	Fidelity Management & Research Co LLC	12

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
New Jersey Municipal Debt Funds	3 Years	Invesco New Jersey Municipal Fund; R6	Invesco Advisers Inc	14
New York Intermediate Municipal Debt Funds	3 Years	ABSanford C. Bernstein New York Municipal Port; Advisor	AllianceBernstein LP	10
New York Municipal Debt Funds	3 Years	BlackRock New York Municipal Opportunities; K	BlackRock Advisors LLC	25
Options Arbitrage/Option Strategies Funds	3 Years	JPMorgan Equity Premium Income Fund; R6	JP Morgan Investment Management Inc	17
Pacific Ex Japan Funds	3 Years	Matthews Asian Growth & Income Fund; Institutional	Matthews International Capital Management LLC	10
Pennsylvania Municipal Debt Funds	3 Years	Invesco Pennsylvania Municipal Fund; R6	Invesco Advisers Inc	15
Precious Metals Equity Funds	3 Years	First Eagle Gold Fund; R6	First Eagle Investment Management LLC	17
Real Estate Funds	3 Years	PGIM US Real Estate Fund; Z	PGIM Investments LLC	55
Real Return Funds	3 Years	Hartford Real Asset; Y	Hartford Funds Management Company LLC	21
Retirement Income Funds	3 Years	Voya Global Diversified Payment Fund; R6	Voya Investments LLC	19
Science & Technology Funds	3 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Co LLC	38
Short High Yield Funds	3 Years	Virtus Newfleet Short Duration High Income; R6	Virtus Investment Advisers Inc	17
Short Investment Grade Debt Funds	3 Years	Diamond Hill Short Duration Securitized Bond Fund; Y	Diamond Hill Funds	97
Short Municipal Debt Funds	3 Years	Morgan Stanley Institutional Short Duration Muni Income Portfolio; IR	Morgan Stanley Investment Management Inc	39
Short U.S. Government Funds	3 Years	DFA Two-Year Government Portfolio	Dimensional Fund Advisors LP	16
Short-Intermediate Investment Grade Debt Funds	3 Years	Channel Short Duration Income Fund	Channel Investment Partners LLC	38
Short-Intermediate Municipal Debt Funds	3 Years	Baird Strategic Municipal Bond Fund; Institutional	Robert W Baird & Company Inc	24
Small-Cap Core Funds	3 Years	Auer Growth Fund	SBAuer Funds LLC	269
Small-Cap Growth Funds	3 Years	Oberweis Small-Cap Opportunities Fund; Institutional	Oberweis Asset Management Inc	171
Small-Cap Value Funds	3 Years	Bridgeway Small-Cap Value Fund	Bridgeway Capital Management LLC	47
U.S. Mortgage Funds	3 Years	Medalist Partners MBS Total Return Fund; Institutional	Medalist Partners LP	37

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Ultra-Short Obligations Funds	3 Years	Pioneer Multi-Asset Ultrashort Income Fund; K	Amundi Asset Management US, Inc.	46
Utility Funds	3 Years	Hennessy Gas Utility Fund; Institutional	Hennessy Advisors Inc	13
Absolute Return Bond Funds	5 Years	Carillon Reams Unconstrained Bond Fund; R-6	Carillon Tower Advisers Inc	18
Absolute Return Funds	5 Years	Catalyst Systematic Alpha Fund; Institutional	Catalyst Capital Advisors LLC	33
Alternative Credit Focus Funds	5 Years	Touchstone Ares Credit Opportunities Fund; Institutional	Touchstone Advisors Inc	24
Alternative Equity Market Neutral Funds	5 Years	Vanguard Market Neutral Fund; Institutional	Vanguard Group Inc	12
Alternative Event Driven Funds	5 Years	Camelot Event-Driven Fund; Institutional	Camelot Event-Driven Advisors LLC	15
Alternative Global Macro Funds	5 Years	Permanent Portfolio; Institutional	Pacific Heights Asset Management LLC	36
Alternative Long/Short Equity Funds	5 Years	Invenomic Fund; Institutional	Invenomic Capital Management LP	62
Alternative Managed Futures Funds	5 Years	Virtus AlphaSimplex Managed Futures Strategy Fund; R6	Virtus Alternative Investment Advisers Inc	19
Alternative Multi-Strategy Funds	5 Years	Abbey Capital Multi Asset Fund; Institutional	Abbey Capital Limited	35
California Intermediate Municipal Debt Funds	5 Years	Payden California Municipal Social Impact Fund; Investor	Payden & Rygel	17
California Municipal Debt Funds	5 Years	Invesco California Municipal Fund; Y	Invesco Advisers Inc	29
China Region Funds	5 Years	Fidelity Advisor China Region Fund; Z	Fidelity Management & Research Co LLC	14
Commodities General Funds	5 Years	AQR Risk-Balanced Commodities Strategy Fund; R6	AQR Capital Management LLC	22
Convertible Securities Funds	5 Years	Fidelity Advisor Convertible Securities Fund; Z	Fidelity Management & Research Co LLC	15
Core Bond Funds	5 Years	Calvert Core Bond Fund; Institutional	Calvert Research and Management	126
Core Plus Bond Funds	5 Years	Weitz Core Plus Income Fund; Institutional	Weitz Investment Management Inc	62
Corporate Debt Funds A Rated	5 Years	Ave Maria Bond Fund	Schwartz Investment Counsel Inc	12
Corporate Debt Funds BBB-Rated	5 Years	Permanent Portfolio Versatile Bond Portfolio; Institutional	Pacific Heights Asset Management LLC	52
Dedicated Short Bias Funds	5 Years	Rydex Inverse Russell 2000 Strategy Fund; H	Security Investors LLC	28

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Emerging Markets Funds	5 Years	Matthews Emerging Markets Small Companies Fund; Institutional	Matthews International Capital Management LLC	164
Emerging Markets Hard Currency Debt Funds	5 Years	Vanguard Emerging Markets Bond Fund; Admiral	Vanguard Group Inc	52
Emerging Markets Local Currency Debt Funds	5 Years	Eaton Vance Emerging Markets Debt Opportunities Fund; R6	Eaton Vance Management	15
Energy MLP Funds	5 Years	Eagle MLP Strategy Fund; N	Eagle Global Advisors LLC	22
Equity Income Funds	5 Years	Huber Select Large Cap Value Fund; Institutional	Huber Capital Management LLC	103
European Region Funds	5 Years	Janus Henderson European Focus Fund; N	Janus Henderson Investors US LLC	16
Financial Services Funds	5 Years	Fidelity Select Brokerage and Investment Management Portfolio	Fidelity Management & Research Co LLC	21
Flexible Income Funds	5 Years	North Square Preferred and Income Securities Fund; Institutional	North Square Investments LLC	21
Flexible Portfolio Funds	5 Years	Calamos Growth & Income Fund; Institutional	Calamos Advisors LLC	125
General & Insured Municipal Debt Funds	5 Years	DFA Municipal Real Return Portfolio; Institutional	Dimensional Fund Advisors LP	83
General Bond Funds	5 Years	Western Asset SMASh Series C Fund	Legg Mason Partners Fund Advisor LLC	21
General U.S. Government Funds	5 Years	American Funds US Government Securities Fund; R6	Capital Group	16
General U.S. Treasury Funds	5 Years	Fidelity Intermediate Treasury Bond Index Fund	Fidelity Management & Research Co LLC	15
Global Equity Income Funds	5 Years	Fidelity Advisor Global Equity Income Fund; Z	Fidelity Management & Research Co LLC	26
Global High Yield Funds	5 Years	American Beacon SiM High Yield Opportunities Fund; R5	American Beacon Advisors Inc	20
Global Income Funds	5 Years	Dodge & Cox Global Bond Fund; Institutional	Dodge & Cox	52
Global Infrastructure Funds	5 Years	Lazard Global Listed Infrastructure Portfolio; Institutional	Lazard Asset Management LLC	20
Global Large-Cap Core	5 Years	Northern Global Sustainability Index Fund; Institutional	Northern Trust Corp	17
Global Large-Cap Growth	5 Years	BNY Mellon Worldwide Growth Fund; Y	BNY Mellon Investment Adviser Inc	41
Global Large-Cap Value	5 Years	Dodge & Cox Global Stock Fund; Institutional	Dodge & Cox	10
Global Multi-Cap Core	5 Years	Nationwide Global Sustainable Equity Fund; R6	Nationwide Fund Advisors	35

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global Multi-Cap Growth	5 Years	MainStay Epoch Capital Growth Fund; Institutional	New York Life Investment Management LLC	25
Global Multi-Cap Value	5 Years	Vanguard Global Capital Cycles Fund; Investor	Wellington Management Company LLP	41
Global Natural Resources Funds	5 Years	Cavanal Hill World Energy Fund; Institutional	Cavanal Hill Investment Management Inc	15
Global Real Estate Funds	5 Years	TCW Global Real Estate Fund;I	TCW Investment Management Company LLC	36
Global Small-/Mid-Cap Funds	5 Years	Virtus KAR Global Small-Cap Fund; Institutional	Virtus Investment Advisers Inc	34
GNMA Funds	5 Years	Victory Fund for Income; Institutional	Victory Capital Management Inc	13
Health/Biotechnology Funds	5 Years	Baron Health Care Fund; R6	BAMCO INC	23
High Yield Funds	5 Years	Fidelity Capital & Income Fund	Fidelity Management & Research Co LLC	109
High Yield Municipal Debt Funds	5 Years	Counterpoint Tactical Municipal Fund; Institutional	Counterpoint Mutual Funds LLC	46
Inflation Protected Bond Funds	5 Years	Eaton Vance Short Duration Inflation-Protected Income Fund; Institutional	Eaton Vance Management	38
Intermediate Municipal Debt Funds	5 Years	AB Municipal Bond Inflation Strategy; Advisor	AllianceBernstein LP	52
Intermediate U.S. Government Funds	5 Years	Victory Government Securities Fund; R6	Victory Capital Management Inc	12
International Equity Income Funds	5 Years	Goldman Sachs International Equity Income Fund; R6	Goldman Sachs Asset Management LP	17
International Income Funds	5 Years	Azzad Wise Capital Fund	Azzad Asset Management Inc	19
International Large-Cap Core	5 Years	Janus Henderson Overseas Fund; N	Janus Henderson Investors US LLC	53
International Large-Cap Growth	5 Years	Thornburg Better World International Fund; Institutional	Thornburg Investment Management Inc	64
International Large-Cap Value	5 Years	Artisan International Value Fund; Institutional	Artisan Partners LP	22
International Multi-Cap Core	5 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged); Institutional	Pacific Investment Management Company LLC	77
International Multi-Cap Growth	5 Years	Clearwater International Fund	Clearwater Management Company Inc	51
International Multi-Cap Value	5 Years	Principal Overseas Fund; Institutional	Principal Global Investors LLC	53
International Small/Mid-Cap Core	5 Years	Transamerica International Small Cap Value; I2	Transamerica Asset Management Inc	10

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Small/Mid-Cap Growth	5 Years	Driehaus International Small Cap Growth Fund	Driehaus Capital Management LLC	49
International Small/Mid-Cap Value	5 Years	Brandes International Small Cap Equity Fund; R6	Brandes Investment Partners LP	10
Large-Cap Core Funds	5 Years	Meehan Focus Fund	Edgemoor Investment Advisors Inc	156
Large-Cap Growth Funds	5 Years	Victory Nasdaq-100 Index Fund; R6	Victory Capital Management Inc	155
Large-Cap Value Funds	5 Years	Fidelity Advisor Mega Cap Stock Fund; Z	Fidelity Management & Research Co LLC	70
Loan Participation Funds	5 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Co LLC	50
Massachusetts Municipal Debt Funds	5 Years	Vanguard Massachusetts Tax-Exempt Fund; Investor	Vanguard Group Inc	10
Mid-Cap Core Funds	5 Years	Saratoga Large Capitalization Value Portfolio; Institutional	Saratoga Capital Management LLC	87
Mid-Cap Growth Funds	5 Years	ClearBridge Mid Cap Growth Fund; Institutional	Legg Mason Partners Fund Advisor LLC	92
Mid-Cap Value Funds	5 Years	Pzena Mid Cap Value Fund; Institutional	Pzena Investment Management LLC	31
Minnesota Municipal Debt Funds	5 Years	Eaton Vance Minnesota Municipal Income Fund; Institutional	Boston Management And Research	12
Mixed-Asset Target 2010 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2010 Fund;I	MML Investment Advisers LLC	26
Mixed-Asset Target 2015 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2015 Fund;I	MML Investment Advisers LLC	26
Mixed-Asset Target 2020 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2020 Fund;I	MML Investment Advisers LLC	34
Mixed-Asset Target 2025 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2025 Fund;I	MML Investment Advisers LLC	43
Mixed-Asset Target 2030 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2030 Fund;I	MML Investment Advisers LLC	44
Mixed-Asset Target 2035 Funds	5 Years	Fidelity Freedom 2035 Fund; K6	Fidelity Management & Research Co LLC	43
Mixed-Asset Target 2040 Funds	5 Years	Fidelity Freedom 2040 Fund; K6	Fidelity Management & Research Co LLC	43
Mixed-Asset Target 2045 Funds	5 Years	Fidelity Freedom 2045 Fund; K6	Fidelity Management & Research Co LLC	42
Mixed-Asset Target 2050 Funds	5 Years	Fidelity Freedom 2050 Fund; K6	Fidelity Management & Research Co LLC	42
Mixed-Asset Target 2055 Funds	5 Years	BlackRock LifePath Dynamic 2055 Fund; K	BlackRock Fund Advisors	42

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2060 Funds	5 Years	TIAA-CREF Lifecycle Index 2060 Fund; Institutional	Teachers Advisors LLC	39
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	JPMorgan Investor Growth Fund; R6	JP Morgan Investment Management Inc	36
Mixed-Asset Target Allocation Conservative Funds	5 Years	Fidelity Advisor Asset Manager 40%; Z	Fidelity Management & Research Co LLC	69
Mixed-Asset Target Allocation Growth Funds	5 Years	T Rowe Price Capital Appreciation Fund; Institutional	T. Rowe Price Associates Inc	109
Mixed-Asset Target Allocation Moderate Funds	5 Years	Fidelity Advisor Balanced Fund; Z	Fidelity Management & Research Co LLC	122
Mixed-Asset Target Today Funds	5 Years	American Century One Choice In Retirement Portfolio;R6	American Century Investment Management Inc	29
Multi-Cap Core Funds	5 Years	John Hancock Fundamental All Cap Core Fund; R6	John Hancock Investment Management LLC	168
Multi-Cap Growth Funds	5 Years	JPMorgan Growth Advantage Fund; R6	JP Morgan Investment Management Inc	97
Multi-Cap Value Funds	5 Years	Natixis Oakmark Fund; N	Natixis Advisors LLC	174
Multi-Sector Income Funds	5 Years	Credit Suisse Strategic Income Fund; Institutional	Credit Suisse Asset Management LLC	84
Natural Resources Funds	5 Years	Hennessy Energy Transition Fund; Institutional	Hennessy Advisors Inc	12
New Jersey Municipal Debt Funds	5 Years	Invesco New Jersey Municipal	Invesco Advisers Inc	14
New York Intermediate Municipal Debt Funds	5 Years	ABSanford C. Bernstein New York Municipal Port; Advisor	AllianceBernstein LP	10
New York Municipal Debt Funds	5 Years	Invesco Rochester New York Municipals Fund; Y	Invesco Advisers Inc	24
Options Arbitrage/Option Strategies Funds	5 Years	Vest US Large Cap 20% Buffer Strategies; Investor	Vest Financial LLC	16
Pacific Ex Japan Funds	5 Years	Invesco EQV Asia Pacific Equity Fund; R6	Invesco Advisers Inc	10
Pennsylvania Municipal Debt Funds	5 Years	Invesco Pennsylvania Municipal Fund; Y	Invesco Advisers Inc	15
Precious Metals Equity Funds	5 Years	OCM Gold Fund;Atlas	Orrell Capital Management Inc	17
Real Estate Funds	5 Years	Cohen & Steers Institutional Realty Shares	Cohen & Steers Capital Management Inc	54
Real Return Funds	5 Years	Morgan Stanley Institutional Multi-Asset Real Assets Portfolio; R6	Morgan Stanley Investment Management Inc	19
Retirement Income Funds	5 Years	Fidelity Advisor Managed Retirement 2025 Fund; Institutional	Fidelity Management & Research Co LLC	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Science & Technology Funds	5 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Co LLC	37
Short High Yield Funds	5 Years	Virtus Newfleet Short Duration High Income; R6	Virtus Investment Advisers Inc	15
Short Investment Grade Debt Funds	5 Years	BBH Limited Duration Fund; Institutional	Brown Brothers Harriman & Co	90
Short Municipal Debt Funds	5 Years	Fidelity Flex Conservative Income Municipal Bond Fund	Fidelity Management & Research Co LLC	37
Short U.S. Government Funds	5 Years	American Funds Short-Term Bond Fund of America; F3	Capital Group	16
Short-Intermediate Investment Grade Debt Funds	5 Years	Channel Short Duration Income Fund	Channel Investment Partners LLC	37
Short-Intermediate Municipal Debt Funds	5 Years	Invesco Limited Term Municipal Income Fund; R6	Invesco Advisers Inc	22
Small-Cap Core Funds	5 Years	Hennessy Cornerstone Mid Cap 30 Fund; Institutional	Hennessy Advisors Inc	257
Small-Cap Growth Funds	5 Years	Needham Aggressive Growth Fund; Institutional	Needham Investment Management LLC	162
Small-Cap Value Funds	5 Years	Bridgeway Small-Cap Value Fund	Bridgeway Capital Management LLC	44
U.S. Mortgage Funds	5 Years	Morgan Stanley Mortgage Securities Trust; R6	Morgan Stanley Investment Management Inc	34
Ultra-Short Obligations Funds	5 Years	Victory Ultra Short-Term Bond Fund; R6	Victory Capital Management Inc	43
Utility Funds	5 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Co LLC	13
Absolute Return Bond Funds	10 Years	PIMCO Credit Opportunities Bond Fund; Institutional	Pacific Investment Management Company LLC	12
Absolute Return Funds	10 Years	Goldman Sachs Absolute Return Tracker Fund; Institutional	Goldman Sachs Asset Management LP	16
Alternative Credit Focus Funds	10 Years	Frost Credit Fund; Institutional	Frost Investment Advisers LLC	15
Alternative Event Driven Funds	10 Years	Camelot Event-Driven Fund; Institutional	Camelot Event-Driven Advisors LLC	10
Alternative Global Macro Funds	10 Years	RiverNorth Core Opportunity Fund; R	RiverNorth Capital Management LLC	35
Alternative Long/Short Equity Funds	10 Years	AB Select US Long/Short Portfolio; Institutional	AllianceBernstein LP	34
Alternative Managed Futures Funds	10 Years	Virtus AlphaSimplex Managed Futures Strategy Fund; Institutional	Virtus Alternative Investment Advisers Inc	13
Alternative Multi-Strategy Funds	10 Years	Principal Global Multi-Strategy Fund; Institutional	Principal Global Investors LLC	14

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
California Intermediate Municipal Debt Funds	10 Years	Payden California Municipal Social Impact Fund; Investor	Payden & Rygel	15
California Municipal Debt Funds	10 Years	Invesco California Municipal Fund; Y	Invesco Advisers Inc	29
China Region Funds	10 Years	Fidelity Advisor China Region Fund; Institutional	Fidelity Management & Research Co LLC	13
Commodities General Funds	10 Years	AQR Risk-Balanced Commodities Strategy Fund; Institutional	AQR Capital Management LLC	18
Convertible Securities Funds	10 Years	Franklin Convertible Securities Fund; Advisor	Franklin Advisers Inc	13
Core Bond Funds	10 Years	Calvert Core Bond; A	Calvert Research and Management	100
Core Plus Bond Funds	10 Years	Morgan Stanley Institutional Core Plus Fixed Income Portfolio; Institutional	Morgan Stanley Investment Management Inc	50
Corporate Debt Funds A Rated	10 Years	Ave Maria Bond Fund	Schwartz Investment Counsel Inc	11
Corporate Debt Funds BBB-Rated	10 Years	Morgan Stanley Institutional Corporate Bond Portfolio; Institutional	Morgan Stanley Investment Management Inc	45
Dedicated Short Bias Funds	10 Years	Rydex Inverse Russell 2000 Strategy Fund; H	Security Investors LLC	28
Emerging Markets Funds	10 Years	Fidelity Emerging Markets Fund; K	Fidelity Management & Research Co LLC	116
Emerging Markets Hard Currency Debt Funds	10 Years	GMO Emerging Country Debt Fund; IV	Grantham, Mayo, Van Otterloo & Co. LLC	38
Emerging Markets Local Currency Debt Funds	10 Years	Eaton Vance Emerging Markets Debt Opportunities Fund; R6	Eaton Vance Management	14
Energy MLP Funds	10 Years	Invesco SteelPath MLP Income Fund; R6	Invesco Advisers Inc	13
Equity Income Funds	10 Years	Buffalo Dividend Focus Fund; Investor	Kornitzer Capital Management Inc	88
European Region Funds	10 Years	DFA Continental Small Company Portfolio; Institutional	Dimensional Fund Advisors LP	16
Financial Services Funds	10 Years	T Rowe Price Financial Services Fund	T. Rowe Price Associates Inc	21
Flexible Income Funds	10 Years	North Square Preferred and Income Securities Fund; Institutional	North Square Investments LLC	14
Flexible Portfolio Funds	10 Years	Calamos Growth & Income Fund; Institutional	Calamos Advisors LLC	82
General & Insured Municipal Debt Funds	10 Years	Invesco AMT-Free Municipal Income Fund; Y	Invesco Advisers Inc	67
General Bond Funds	10 Years	Western Asset SMASh Series C Fund	Legg Mason Partners Fund Advisor LLC	14

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
General U.S. Government Funds	10 Years	American Funds US Government Securities Fund; R6	Capital Group	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	21
Global High Yield Funds	10 Years	American Beacon SIM High Yield Opportunities Fund; R5	American Beacon Advisors Inc	17
Global Income Funds	10 Years	JPMorgan Global Bond Opportunities; R6	JP Morgan Investment Management Inc	40
Global Infrastructure Funds	10 Years	Lazard Global Listed Infrastructure Portfolio; Institutional	Lazard Asset Management LLC	13
Global Large-Cap Core	10 Years	Janus Henderson Global Research Fund; Institutional	Janus Henderson Investors US LLC	11
Global Large-Cap Growth	10 Years	American Funds New Perspective Fund; R6	Capital Group	29
Global Multi-Cap Core	10 Years	Franklin Global Equity Fund; I	Legg Mason Partners Fund Advisor LLC	23
Global Multi-Cap Growth	10 Years	AB Sustainable Global Thematic Fund; Institutional	AllianceBernstein LP	17
Global Multi-Cap Value	10 Years	Pioneer Global Sustainable Equity; Y	Amundi Asset Management US, Inc.	31
Global Natural Resources Funds	10 Years	Fidelity Advisor Global Commodity Stock Fund; Institutional	Fidelity Management & Research Co LLC	13
Global Real Estate Funds	10 Years	Virtus Duff & Phelps Global Real Estate Securities Fund; Institutional	Virtus Investment Advisers Inc	29
Global Small-/Mid-Cap Funds	10 Years	Yorktown Growth Fund; Institutional	Yorktown Management & Research Co Inc	22
GNMA Funds	10 Years	PIMCO GNMA & GS Fund; Institutional	Pacific Investment Management Company LLC	13
Health/Biotechnology Funds	10 Years	T Rowe Price Health Sciences Fund	T. Rowe Price Associates Inc	22
High Yield Funds	10 Years	Fidelity Capital & Income Fund	Fidelity Management & Research Co LLC	95
High Yield Municipal Debt Funds	10 Years	Invesco Rochester Municipal Opportunities Fund; Y	Invesco Advisers Inc	34
Inflation Protected Bond Funds	10 Years	AB Bond Inflation Strategy; Institutional	AllianceBernstein LP	32
Intermediate Municipal Debt Funds	10 Years	Parametric TABS 5-to-15 Year Laddered Municipal Bond Fund; Institutional	Eaton Vance Management	46
Intermediate U.S. Government Funds	10 Years	American Funds Mortgage Fund; R6	Capital Group	11

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Equity Income Funds	10 Years	Janus Henderson Responsible International Dividend Fund; Institutional	Janus Henderson Investors US LLC	12
International Income Funds	10 Years	PIMCO International Bond Fund (US Dollar-Hedged); Institutional	Pacific Investment Management Company LLC	16
International Large-Cap Core	10 Years	MFS International Equity Fund; R6	Massachusetts Financial Services Co	38
International Large-Cap Growth	10 Years	WCM Focused International Growth Fund; Institutional	Wcm Investment Management LLC	51
International Large-Cap Value	10 Years	Artisan International Value Fund; Institutional	Artisan Partners LP	20
International Multi-Cap Core	10 Years	PIMCO StocksPLUS International Fund (US Dollar-Hedged); Institutional	Pacific Investment Management Company LLC	54
International Multi-Cap Growth	10 Years	MFS International Intrinsic Value Fund; R6	Massachusetts Financial Services Co	39
International Multi-Cap Value	10 Years	Hartford International Value Fund; Y	Hartford Funds Management Company LLC	42
International Small/Mid-Cap Growth	10 Years	Driehaus International Small Cap Growth Fund	Driehaus Capital Management LLC	36
Large-Cap Core Funds	10 Years	Pear Tree Quality Fund; Institutional	Pear Tree Advisors Inc	133
Large-Cap Growth Funds	10 Years	Victory Nasdaq-100 Index Fund; Fund	Victory Capital Management Inc	140
Large-Cap Value Funds	10 Years	Fidelity Advisor Mega Cap Stock Fund; Z	Fidelity Management & Research Co LLC	67
Loan Participation Funds	10 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Co LLC	45
Massachusetts Municipal Debt Funds	10 Years	Vanguard Massachusetts Tax-Exempt Fund; Investor	Vanguard Group Inc	10
Mid-Cap Core Funds	10 Years	Victory Sycamore Established Value Fund; Institutional	Victory Capital Management Inc	71
Mid-Cap Growth Funds	10 Years	MFS Mid Cap Growth Fund; R6	Massachusetts Financial Services Co	84
Mid-Cap Value Funds	10 Years	Nuveen Mid Cap Value Fund; Institutional	Nuveen Fund Advisors LLC	26
Minnesota Municipal Debt Funds	10 Years	Nuveen Minnesota Municipal Bond Fund; Institutional	Nuveen Fund Advisors LLC	11
Mixed-Asset Target 2010 Funds	10 Years	T Rowe Price Retirement 2010 Fund	T. Rowe Price Associates Inc	16
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	18

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2025 Funds	10 Years	T Rowe Price Retirement 2025 Fund	T. Rowe Price Associates Inc	28
Mixed-Asset Target 2030 Funds	10 Years	MoA Clear Passage 2030 Fund	Mutual of America Capital Management LLC	28
Mixed-Asset Target 2035 Funds	10 Years	MoA Clear Passage 2035 Fund	Mutual of America Capital Management LLC	27
Mixed-Asset Target 2040 Funds	10 Years	MoA Clear Passage 2040 Fund	Mutual of America Capital Management LLC	26
Mixed-Asset Target 2045 Funds	10 Years	TIAA-CREF Lifecycle Index 2045 Fund; Institutional	Teachers Advisors LLC	27
Mixed-Asset Target 2050 Funds	10 Years	TIAA-CREF Lifecycle Index 2050 Fund; Institutional	Teachers Advisors LLC	26
Mixed-Asset Target 2055 Funds	10 Years	TIAA-CREF Lifecycle Index 2055 Fund; Institutional	Teachers Advisors LLC	23
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	JPMorgan Investor Growth Fund; Institutional	JP Morgan Investment Management Inc	33
Mixed-Asset Target Allocation Conservative Funds	10 Years	Vanguard Wellesley Income Fund; Admiral	Wellington Management Company LLP	60
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	Fidelity Advisor Balanced Fund; Z	Fidelity Management & Research Co LLC	108
Mixed-Asset Target Today Funds	10 Years	American Century One Choice In Retirement Portfolio; R6	American Century Investment Management Inc	19
Multi-Cap Core Funds	10 Years	Vanguard Tax-Managed Capital Appreciation Fund; Institutional	Vanguard Group Inc	137
Multi-Cap Growth Funds	10 Years	Fidelity Advisor Series Growth Opportunities Fund	Fidelity Management & Research Co LLC	83
Multi-Cap Value Funds	10 Years	Parnassus Value Equity Fund; Investor	Parnassus Investments	143
Multi-Sector Income Funds	10 Years	Credit Suisse Strategic Income Fund; Institutional	Credit Suisse Asset Management LLC	59
Natural Resources Funds	10 Years	Fidelity Select Energy Portfolio	Fidelity Management & Research Co LLC	11
New Jersey Municipal Debt Funds	10 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund; Admiral	Vanguard Group Inc	14
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	15
Precious Metals Equity Funds	10 Years	OCM Gold Fund;Atlas	Orrell Capital Management Inc	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Real Estate Funds	10 Years	Cohen & Steers Real Estate Securities Fund; Institutional	Cohen & Steers Capital Management Inc	45
Real Return Funds	10 Years	Delaware Global Listed Real Assets Fund; Institutional	Delaware Management Co	15
Retirement Income Funds	10 Years	Fidelity Advisor Managed Retirement 2025 Fund; Institutional	Fidelity Management & Research Co LLC	14
Science & Technology Funds	10 Years	Fidelity Advisor Technology Fund; Institutional	Fidelity Management & Research Co LLC	35
Short High Yield Funds	10 Years	MainStay MacKay Short Duration High Yield Fund; Institutional	New York Life Investment Management LLC	11
Short Investment Grade Debt Funds	10 Years	PIMCO Low Duration Income Fund; Institutional	Pacific Investment Management Company LLC	73
Short Municipal Debt Funds	10 Years	Invesco Short Term Municipal Fund; Y	Invesco Advisers Inc	28
Short U.S. Government Funds	10 Years	Eaton Vance Short Duration Government Income Fund; Institutional	Boston Management And Research	16
Short-Intermediate Investment Grade Debt Funds	10 Years	Channel Short Duration Income Fund	Channel Investment Partners LLC	30
Short-Intermediate Municipal Debt Funds	10 Years	Eaton Vance Short Duration Municipal Opportunities Fund; Institutional	Eaton Vance Management	19
Small-Cap Core Funds	10 Years	Thrivent Small Cap Stock Fund; S	Thrivent Asset Management LLC	224
Small-Cap Growth Funds	10 Years	Wasatch Core Growth Fund; Institutional	Wasatch Advisors LP	136
Small-Cap Value Funds	10 Years	DFA US Targeted Value Portfolio; Institutional	Dimensional Fund Advisors LP	39
U.S. Mortgage Funds	10 Years	Morgan Stanley Mortgage Securities Trust; Institutional	Morgan Stanley Investment Management Inc	28
Ultra-Short Obligations Funds	10 Years	PIMCO Short-Term Fund; Institutional	Pacific Investment Management Company LLC	29
Utility Funds	10 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Co LLC	13

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