

LSEG

Lipper
Fund Awards

UNITED STATES 2025

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	Dimensional
Equity	Small Company	Brandes Investment Partners
Fixed Income	Large Company	MFS
Fixed Income	Small Company	CrossingBridge
Mixed Assets	Large Company	Franklin Templeton
Mixed Assets	Small Company	Saratoga
Overall	Large Company	TIAA
Overall	Small Company	Eaton Vance

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	32
Alternative Credit Focus Funds	3 Years	PGIM Securitized Credit Fund;Z	PGIM Investments LLC	22
Alternative Equity Market Neutral Funds	3 Years	AQR Equity Market Neutral Fund;R6	AQR Capital Management LLC	13
Alternative Event Driven Funds	3 Years	Gabelli ABC Fund;AAA	Gabelli Funds LLC	15
Alternative Global Macro Funds	3 Years	Permanent Portfolio;l	Pacific Heights Asset Management LLC	34
Alternative Long/Short Equity Funds	3 Years	AQR Long-Short Equity Fund;R6	AQR Capital Management LLC	63
Alternative Managed Futures Funds	3 Years	AQR Managed Futures Strategy HV Fund;R6	AQR Capital Management LLC	20
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 Municipal 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	John Hancock California Municipal Bond Fund;I	John Hancock Investment Management LLC	31
China Region Funds	3 Years	Fidelity Advisor China Region Fund;Z	Fidelity Management & Research Company LLC	21
Commodities General Funds	3 Years	PIMCO CommoditiesPLUS Strategy Fund;Institutional	Pacific Investment Management Company LLC	23
Convertible Securities Funds	3 Years	Fidelity Advisor Convertible Securities Fund;Z	Fidelity Management & Research Company LLC	15
Core Bond Funds	3 Years	Putnam Core Bond Fund;Y	Franklin Advisers Inc	130
Core Plus Bond Funds	3 Years	RBC BlueBay Core Plus Bond Fund;R6	RBC Global Asset Management (US) Inc	70
Corporate Debt Funds A Rated	3 Years	Ave Maria Bond Fund	Schwartz Investment Counsel Inc	10
Corporate Debt Funds BBB-Rated	3 Years	BNY Mellon Corporate Bond Fund;M	BNY Mellon Investment Adviser Inc	56
Dedicated Short Bias Funds	3 Years	ProFunds Short Real Estate ProFund;Investor	ProFund Advisors LLC	28
Emerging Markets Funds	3 Years	PIMCO RAE Emerging Markets Fund;Institutional	Pacific Investment Management Company LLC	183
Emerging Markets Hard Currency Debt Funds	3 Years	Franklin Emerging Market Debt Opportunities Fund	Franklin Templeton Investment Management Ltd	50
Emerging Markets Local Currency Debt Fds	3 Years	Eaton Vance Emerging Markets Debt Opportunities;R6	Eaton Vance Management	16
Energy MLP Funds	3 Years	Invesco SteelPath MLP Alpha Plus Fund;R6	Invesco Advisers Inc	21
Equity Income Funds	3 Years	Macquarie Growth & Income Fund;R6	Delaware Management Co	105
European Region Funds	3 Years	Brown Advisory-WMC Strategic European Equity Fund;Institutional	Brown Advisory LLC	15
Financial Services Funds	3 Years	Fidelity Select Brokerage and Investment Management Portfolio	Fidelity Management & Research Company LLC	21
Flexible Income Funds	3 Years	North Square Preferred and Income Securities Fund;I	North Square Investments LLC	22
Flexible Portfolio Funds	3 Years	GuidePath Tactical Allocation Fund;Service	AssetMark Inc	133
General & Insured Municipal Debt Funds	3 Years	Baird Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	86
General Bond Funds	3 Years	CrossingBridge Responsible Credit Fund;Institutional	CrossingBridge Advisors LLC	29
General U.S. Government Funds	3 Years	Sit US Government Securities Fund;Y	Sit Investment Associates Inc	14

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	Blue Current Global Dividend;Institutional	Edge Capital Group LLC	26
Global High Yield Funds	3 Years	American Beacon SiM High Yield Opportunities;Y	American Beacon Advisors Inc	19
Global Income Funds	3 Years	Morgan Stanley Global Fixed Income Opportunities Fund;I	Morgan Stanley Investment Management Inc	54
Global Infrastructure Funds	3 Years	Centre Global Infrastructure Fund;Institutional	Centre Asset Management LLC	24
Global Large-Cap Core	3 Years	Janus Henderson Global Select Fund;N	Janus Henderson Investors US LLC	18
Global Large-Cap Growth	3 Years	Fisher Investments Institutional Group ESG Stock Fund for Retirement Plans	Fisher Asset Management LLC	48
Global Large-Cap Value	3 Years	Vanguard Global ESG Select Stock Fund;Admiral	Wellington Management Company LLP	13
Global Multi-Cap Core	3 Years	Franklin Global Equity Fund;IS	Franklin Templeton Fund Adviser LLC	35
Global Multi-Cap Growth	3 Years	Victory RS Global Fund;R6	Victory Capital Management Inc	32
Global Multi-Cap Value	3 Years	Victory Pioneer Global Value Fund;Y	Victory Capital Management Inc	40
Global Natural Resources Funds	3 Years	Cavanal Hill World Energy Fund;Institutional	Cavanal Hill Investment Management Inc	15
Global Real Estate Funds	3 Years	Third Avenue Real Estate Value Fund;Z	Third Avenue Management LLC	34
Global Small-/Mid-Cap Funds	3 Years	Kinetics Global Fund;No Load	Horizon Kinetics Asset Management LLC	35
GNMA Funds	3 Years	Victory Fund for Income;R6	Victory Capital Management Inc	13
Health/Biotechnology Funds	3 Years	PGIM Jennison Health Sciences Fund;R6	PGIM Investments LLC	27
High Yield Funds	3 Years	Manning & Napier High Yield Bond Series;W	Manning & Napier Advisors LLC	104
High Yield Municipal Debt Funds	3 Years	First Eagle High Yield Municipal Fund;R6	First Eagle Investment Management LLC	49
Industrials Funds	3 Years	Fidelity Advisor Industrials Fund;Z	Fidelity Management & Research Company LLC	10
Inflation Protected Bond Funds	3 Years	Eaton Vance Short Duration Inflation-Protected Income Fund;I	Eaton Vance Management	42
Intermediate Municipal Debt Funds	3 Years	PIMCO National Intermediate Municipal Bond;Institutional	Pacific Investment Management Company LLC	54

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Intermediate U.S. Government Funds	3 Years	Victory Government Securities Fund;R6	Victory Capital Management Inc	13
International Equity Income Funds	3 Years	Goldman Sachs International Equity Income Fund;P	Goldman Sachs Asset Management LP	15
International Income Funds	3 Years	Dunham International Opportunity Bond Fund;N	Dunham & Associates Investment Counsel Inc	20
International Large-Cap Core	3 Years	State Street Hedged Internatl Developed Eq Idx;K	SSgA Funds Management Inc	69
International Large-Cap Growth	3 Years	Marsico International Opportunities Fund;Investor	Marsico Capital Management LLC	81
International Large-Cap Value	3 Years	Artisan International Value Fund;Institutional	Artisan Partners LP	28
International Multi-Cap Core	3 Years	FMI International Fund;Institutional	Fiduciary Management Inc	64
International Multi-Cap Growth	3 Years	Victory RS International Fund;R6	Victory Capital Management Inc	41
International Multi-Cap Value	3 Years	Brandes International Equity Fund;R6	Brandes Investment Partners LP	53
International Small/Mid-Cap Core	3 Years	Segall Bryant & Hamill International Small Cap;Institutional	Segall Bryant & Hamill LLC	16
International Small/Mid-Cap Growth	3 Years	Nuveen Quant International Small Cap Equity Fund;W	Nuveen Fund Advisors LLC	46
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	Bretton Fund	Bretton Capital Management LLC	161
Large-Cap Growth Funds	3 Years	Loomis Sayles Growth Fund;N	Loomis Sayles & Company LP	166
Large-Cap Value Funds	3 Years	Fidelity Large Cap Stock K6 Fund	Fidelity Management & Research Company LLC	70
Loan Participation Funds	3 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Company LLC	48
Massachusetts Municipal Debt Funds	3 Years	MFS Massachusetts Municipal Bond Fund;R6	Massachusetts Financial Services Co	10
Mid-Cap Core Funds	3 Years	Fidelity Mid Cap Value K6 Fund	Fidelity Management & Research Company LLC	85
Mid-Cap Growth Funds	3 Years	Federated Hermes MDT Mid Cap Growth Fund;R6	Federated MDTA LLC	97
Mid-Cap Value Funds	3 Years	Invesco Value Opportunities Fund;R6	Invesco Advisers Inc	36
Minnesota Municipal Debt Funds	3 Years	Macquarie Minnesota High-Yield Municipal Bond Fund;Institutional	Delaware Management Co	12

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Mixed-Asset Target 2010 Funds	3 Years	T. Rowe Price Retirement Blend 2010 Fund;I	T. Rowe Price Associates Inc	21
Mixed-Asset Target 2015 Funds	3 Years	T. Rowe Price Retirement Blend 2015 Fund;I	T. Rowe Price Associates Inc	26
Mixed-Asset Target 2020 Funds	3 Years	T. Rowe Price Retirement Blend 2020 Fund;I	T. Rowe Price Associates Inc	33
Mixed-Asset Target 2025 Funds	3 Years	T. Rowe Price Retirement Blend 2025 Fund;I	T. Rowe Price Associates Inc	40
Mixed-Asset Target 2030 Funds	3 Years	MoA Clear Passage 2030 Fund	Mutual of America Capital Management LLC	45
Mixed-Asset Target 2035 Funds	3 Years	Putnam Retirement Advantage 2035 Fund;R6	Franklin Advisers Inc	44
Mixed-Asset Target 2040 Funds	3 Years	Putnam Retirement Advantage 2040 Fund;R6	Franklin Advisers Inc	45
Mixed-Asset Target 2045 Funds	3 Years	Putnam Retirement Advantage 2045 Fund;R6	Franklin Advisers Inc	43
Mixed-Asset Target 2050 Funds	3 Years	Putnam Retirement Advantage 2050 Fund;R6	Franklin Advisers Inc	43
Mixed-Asset Target 2055 Funds	3 Years	Putnam Retirement Advantage 2055 Fund;R6	Franklin Advisers Inc	43
Mixed-Asset Target 2060 Funds	3 Years	Putnam Retirement Advantage 2060 Fund;R6	Franklin Advisers Inc	42
Mixed-Asset Target 2060+ Funds	3 Years	Putnam Retirement Advantage 2065 Fund;R6	Franklin Advisers Inc	32
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	Franklin Multi-Asset Growth Fund;I	Franklin Templeton Fund Adviser LLC	38
Mixed-Asset Target Allocation Conservative Funds	3 Years	John Hancock Multi-Asset High Income Fund;NAV	John Hancock Investment Management LLC	75
Mixed-Asset Target Allocation Growth Funds	3 Years	Disciplined Growth Investors Fund;I	Disciplined Growth Investors Inc	113
Mixed-Asset Target Allocation Moderate Funds	3 Years	MoA Balanced Fund	Mutual of America Capital Management LLC	123
Mixed-Asset Target Today Funds	3 Years	Putnam Sustainable Retirement Maturity Fund;R6	Franklin Advisers Inc	29
Multi-Cap Core Funds	3 Years	Gotham Index Plus Fund;Institutional	Gotham Asset Management LLC	187
Multi-Cap Growth Funds	3 Years	One Rock Fund	Wrona Investment Management LLC	86
Multi-Cap Value Funds	3 Years	O'Shaughnessy Market Leaders Value Fund;I	O'Shaughnessy Asset Management LLC	171
Multi-Sector Income Funds	3 Years	Credit Suisse Strategic Income Fund;I	UBS Asset Management (Americas) LLC	94

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Natural Resources Funds	3 Years	Hennessy Energy Transition Fund;Institutional	Hennessy Advisors Inc	13
New Jersey Municipal Debt Funds	3 Years	Western Asset New Jersey Municipals Fund;I	Franklin Templeton Fund Adviser LLC	14
New York Intermediate Municipal Debt Funds	3 Years	AB Intermediate New York Municipal Portfolio;Advisor	AllianceBernstein LP	10
New York Municipal Debt Funds	3 Years	BlackRock New York Municipal Opportunities;K	BlackRock Advisors LLC	24
Options Arbitrage/Opt Strategies Funds	3 Years	JPMorgan Hedged Equity Fund;R6	JP Morgan Investment Management Inc	19
Pennsylvania Municipal Debt Funds	3 Years	Macquarie Tax-Free Pennsylvania Fund;Institutional	Delaware Management Co	15
Precious Metals Equity Funds	3 Years	Allspring Precious Metals Fund;Institutional	Allspring Funds Management LLC	17
Real Estate Funds	3 Years	PGIM Real Estate Income Fund;Z	PGIM Investments LLC	51
Real Return Funds	3 Years	PGIM Real Assets Fund;R6	PGIM Investments LLC	19
Retirement Income Funds	3 Years	American Funds Retirement Income Portfolio - Enhanced;R6	Capital Research and Management Co	18
Science & Technology Funds	3 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Company LLC	38
Short High Yield Funds	3 Years	Lord Abbett Short Duration High Yield;F3	Lord Abbett & Co LLC	19
Short Investment Grade Debt Funds	3 Years	Medalist Partners Short Duration Fund;Institutional	Medalist Partners LP	93
Short Municipal Debt Funds	3 Years	Federated Hermes Conservative Municipal Microshort;Institutional	Federated Investment Management Co	37
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 Income Fund	Channel Investment Partners LLC	38
Short-Intermediate Municipal Debt Funds	3 Years	Baird Strategic Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	23
Short-Intermediate U.S. Government Funds	3 Years	DFA Short-Term Government Portfolio;Institutional	Dimensional Fund Advisors LP	10
Small-Cap Core Funds	3 Years	Hennessy Cornerstone Mid Cap 30 Fund;Institutional	Hennessy Advisors Inc	279
Small-Cap Growth Funds	3 Years	Virtus KAR Small-Cap Core Fund;R6	Virtus Investment Advisers LLC	157
Small-Cap Value Funds	3 Years	Invesco Small Cap Value Fund;R6	Invesco Advisers Inc	49

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
U.S. Mortgage Funds	3 Years	Medalist Partners MBS Total Return Fund;Institutional	Medalist Partners LP	37
Ultra-Short Obligations Funds	3 Years	Pioneer Multi-Asset Ultrashort Income Fund;K	Amundi Asset Management US Inc	45
Utility Funds	3 Years	Fidelity Select Telecom and Utilities Fund	Fidelity Management & Research Company LLC	13
Absolute Return Bond Funds	5 Years	Calvert Flexible Bond Fund;R6	Calvert Research and Management	18
Absolute Return Funds	5 Years	Goldman Sachs Absolute Return Tracker Fund;P	Goldman Sachs Asset Management LP	31
Alternative Credit Focus Funds	5 Years	Touchstone Ares Credit Opportunities Fund;Institutional	Touchstone Advisors Inc	21
Alternative Equity Market Neutral Funds	5 Years	AQR Equity Market Neutral Fund;R6	AQR Capital Management LLC	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;I	Pacific Heights Asset Management LLC	34
Alternative Long/Short Equity Funds	5 Years	Gator Capital Long/Short Fund	Gator Capital Management LLC	59
Alternative Managed Futures Funds	5 Years	AQR Managed Futures Strategy HV Fund;R6	AQR Capital Management LLC	18
Alternative Multi-Strategy Funds	5 Years	Abbey Capital Multi Asset Fund;I	Abbey Capital Limited	36
California Intermediate Municipal Debt Funds	5 Years	PIMCO California Municipal Opportunistic Value Fund;Institutional	Pacific Investment Management Company LLC	17
California Municipal Debt Funds	5 Years	Macquarie Tax-Free California Fund;Institutional	Delaware Management Co	31
China Region Funds	5 Years	Fidelity Advisor China Region Fund;Z	Fidelity Management & Research Company LLC	14
Commodities General Funds	5 Years	AQR Risk-Balanced Commodities Strategy Fund;R6	AQR Capital Management LLC	23
Convertible Securities Funds	5 Years	Fidelity Advisor Convertible Securities Fund;Z	Fidelity Management & Research Company LLC	14
Core Bond Funds	5 Years	TCW MetWest Investment Grade Credit Fund;I	Metropolitan West Asset Management LLC	126
Core Plus Bond Funds	5 Years	Weitz Core Plus Income Fund;Institutional	Weitz Investment Management Inc	64
Corporate Debt Funds A Rated	5 Years	Ave Maria Bond Fund	Schwartz Investment Counsel Inc	10
Corporate Debt Funds BBB-Rated	5 Years	BNY Mellon Corporate Bond Fund;M	BNY Mellon Investment Adviser Inc	53

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Dedicated Short Bias Funds	5 Years	ProFunds Short Real Estate ProFund;Investor	ProFund Advisors LLC	28
Emerging Markets Funds	5 Years	JOHCM Emerging Markets Discovery Fund;Institutional	JOHCM (USA) Inc	162
Emerging Markets Hard Currency Debt Funds	5 Years	Franklin Emerging Market Debt Opportunities Fund	Franklin Templeton Investment Management Ltd	47
Emerging Markets Local Currency Debt Fds	5 Years	Eaton Vance Emerging Markets Debt Opportunities;R6	Eaton Vance Management	15
Energy MLP Funds	5 Years	Invesco SteelPath MLP Alpha Plus Fund;R6	Invesco Advisers Inc	21
Equity Income Funds	5 Years	Huber Select Large Cap Value Fund;Institutional	Huber Capital Management LLC	102
European Region Funds	5 Years	Janus Henderson European Focus Fund;N	Janus Henderson Investors US LLC	15
Financial Services Funds	5 Years	T. Rowe Price Financial Services Fund;I	T. Rowe Price Associates Inc	21
Flexible Income Funds	5 Years	North Square Preferred and Income Securities Fund;I	North Square Investments LLC	22
Flexible Portfolio Funds	5 Years	Calamos Growth & Income Fund;I	Calamos Advisors LLC	120
General & Insured Municipal Debt Funds	5 Years	Baird Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	84
General Bond Funds	5 Years	RiverNorth/Oaktree High Income Fund;I	RiverNorth Capital Management LLC	19
General U.S. Government Funds	5 Years	Sit US Government Securities Fund;S	Sit Investment Associates Inc	13
General U.S. Treasury Funds	5 Years	Vanguard Intermediate-Term Treasury Fund;Admiral	Vanguard Group Inc	15
Global Equity Income Funds	5 Years	Blue Current Global Dividend;Institutional	Edge Capital Group LLC	24
Global High Yield Funds	5 Years	American Beacon SiM High Yield Opportunities;Y	American Beacon Advisors Inc	17
Global Income Funds	5 Years	Dodge & Cox Global Bond Fund;I	Dodge & Cox	50
Global Infrastructure Funds	5 Years	Nuveen Global Infrastructure Fund;R6	Nuveen Fund Advisors LLC	21
Global Large-Cap Core	5 Years	Janus Henderson Global Select Fund;N	Janus Henderson Investors US LLC	17
Global Large-Cap Growth	5 Years	Guinness Atkinson Global Innovators Fund;Institutional	Guinness Atkinson Asset Management Inc	44
Global Large-Cap Value	5 Years	Vanguard Global ESG Select Stock Fund;Admiral	Wellington Management Company LLP	13

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Global Multi-Cap Core	5 Years	Franklin Global Equity Fund;IS	Franklin Templeton Fund Adviser LLC	33
Global Multi-Cap Growth	5 Years	Fidelity Advisor Worldwide Fund;Z	Fidelity Management & Research Company LLC	27
Global Multi-Cap Value	5 Years	Victory Pioneer Global Equity Fund;R6	Victory Capital Management Inc	34
Global Natural Resources Funds	5 Years	Cavanal Hill World Energy Fund;Institutional	Cavanal Hill Investment Management Inc	15
Global Real Estate Funds	5 Years	Third Avenue Real Estate Value Fund;Z	Third Avenue Management LLC	33
Global Small-/Mid-Cap Funds	5 Years	Kinetics Global Fund;No Load	Horizon Kinetics Asset Management LLC	34
GNMA Funds	5 Years	Victory Fund for Income;R6	Victory Capital Management Inc	13
Health/Biotechnology Funds	5 Years	PGIM Jennison Health Sciences Fund;R6	PGIM Investments LLC	27
High Yield Funds	5 Years	Manning & Napier High Yield Bond Series;W	Manning & Napier Advisors LLC	101
High Yield Municipal Debt Funds	5 Years	First Eagle High Yield Municipal Fund;R6	First Eagle Investment Management LLC	49
Inflation Protected Bond Funds	5 Years	Eaton Vance Short Duration Inflation-Protected Income Fund;I	Eaton Vance Management	39
Intermediate Municipal Debt Funds	5 Years	AB Municipal Bond Inflation Strategy;2	AllianceBernstein LP	53
Intermediate U.S. Government Funds	5 Years	Victory Government Securities Fund;R6	Victory Capital Management Inc	13
International Equity Income Funds	5 Years	Goldman Sachs International Equity Income Fund;P	Goldman Sachs Asset Management LP	14
International Income Funds	5 Years	Azzad Wise Capital Fund	Azzad Asset Management Inc	18
International Large-Cap Core	5 Years	Transamerica International Stock;I2	Transamerica Asset Management Inc	67
International Large-Cap Growth	5 Years	Thornburg Better World International Fund;I	Thornburg Investment Management Inc	76
International Large-Cap Value	5 Years	Artisan International Value Fund;Institutional	Artisan Partners LP	26
International Multi-Cap Core	5 Years	Dunham International Stock Fund;N	Dunham & Associates Investment Counsel Inc	59
International Multi-Cap Growth	5 Years	Clearwater International Fund	Clearwater Management Co Inc	40
International Multi-Cap Value	5 Years	Brandes International Equity Fund;R6	Brandes Investment Partners LP	49

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
International Small/Mid-Cap Core	5 Years	Oakmark International Small Cap Fund;Institutional	Harris Associates LP	13
International Small/Mid-Cap Growth	5 Years	Voya Multi-Manager International Small Cap Fund;I	Voya Investments LLC	45
International Small/Mid-Cap Value	5 Years	Brandes International Small Cap Equity Fund;R6	Brandes Investment Partners LP	12
Large-Cap Core Funds	5 Years	Meehan Focus Fund	Edgemoor Investment Advisors Inc	155
Large-Cap Growth Funds	5 Years	Fidelity Series Growth Company Fund	Fidelity Management & Research Company LLC	163
Large-Cap Value Funds	5 Years	Fidelity Large Cap Stock K6 Fund	Fidelity Management & Research Company LLC	68
Loan Participation Funds	5 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Company LLC	48
Massachusetts Municipal Debt Funds	5 Years	MFS Massachusetts Municipal Bond Fund;R6	Massachusetts Financial Services Co	10
Mid-Cap Core Funds	5 Years	Fidelity Value Strategies Fund;K	Fidelity Management & Research Company LLC	83
Mid-Cap Growth Funds	5 Years	Federated Hermes MDT Mid Cap Growth Fund;R6	Federated MDTA LLC	88
Mid-Cap Value Funds	5 Years	Invesco Value Opportunities Fund;R6	Invesco Advisers Inc	33
Minnesota Municipal Debt Funds	5 Years	Macquarie Minnesota High-Yield Municipal Bond Fund;Institutional	Delaware Management Co	12
Mixed-Asset Target 2010 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2010 Fund;I	MML Investment Advisers LLC	19
Mixed-Asset Target 2015 Funds	5 Years	MassMutual Select T Rowe Price Price Retirement 2015 Fund;I	MML Investment Advisers LLC	24
Mixed-Asset Target 2020 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2020 Fund;I	MML Investment Advisers LLC	31
Mixed-Asset Target 2025 Funds	5 Years	MassMutual Select T Rowe Price Retirement 2025 Fund;I	MML Investment Advisers LLC	37
Mixed-Asset Target 2030 Funds	5 Years	MoA Clear Passage 2030 Fund	Mutual of America Capital Management LLC	41
Mixed-Asset Target 2035 Funds	5 Years	MoA Clear Passage 2035 Fund	Mutual of America Capital Management LLC	40
Mixed-Asset Target 2040 Funds	5 Years	MoA Clear Passage 2040 Fund	Mutual of America Capital Management LLC	40
Mixed-Asset Target 2045 Funds	5 Years	DFA Dimensional 2045 Target Date Retirement Income Fund;Institutional	Dimensional Fund Advisors LP	39
Mixed-Asset Target 2050 Funds	5 Years	DFA Dimensional 2050 Target Date Retirement Income Fund;Institutional	Dimensional Fund Advisors LP	39

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2055 Funds	5 Years	DFA Dimensional 2055 Target Date Retirement Income Fund;Institutional	Dimensional Fund Advisors LP	39
Mixed-Asset Target 2060 Funds	5 Years	DFA Dimensional 2060 Target Date Retirement Income Fund;Institutional	Dimensional Fund Advisors LP	36
Mixed-Asset Target 2060+ Funds	5 Years	BlackRock LifePath Dynamic 2065 Fund;K	BlackRock Fund Advisors	10
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	JPMorgan Investor Growth Fund;R6	JP Morgan Investment Management Inc	35
Mixed-Asset Target Allocation Conservative Funds	5 Years	Westwood Multi-Asset Income Fund;Institutional	Westwood Management Corp	70
Mixed-Asset Target Allocation Growth Funds	5 Years	Davis Balanced Fund;Y	Davis Selected Advisers LP	109
Mixed-Asset Target Allocation Moderate Funds	5 Years	MoA Balanced Fund	Mutual of America Capital Management LLC	117
Mixed-Asset Target Today Funds	5 Years	American Century One Choice In Retirement Portfolio;R6	American Century Investment Management Inc	27
Multi-Cap Core Funds	5 Years	Federated Hermes MDT All Cap Core Fund;R6	Federated MDTA LLC	179
Multi-Cap Growth Funds	5 Years	Fidelity Trend Fund	Fidelity Management & Research Company LLC	79
Multi-Cap Value Funds	5 Years	BNY Mellon Dynamic Value Fund;Y	BNY Mellon Investment Adviser Inc	163
Multi-Sector Income Funds	5 Years	Credit Suisse Strategic Income Fund;I	UBS Asset Management (Americas) LLC	87
Natural Resources Funds	5 Years	Hennessy Energy Transition Fund;Institutional	Hennessy Advisors Inc	13
New Jersey Municipal Debt Funds	5 Years	Invesco New Jersey Municipal Fund;R6	Invesco Advisers Inc	14
New York Intermediate Municipal Debt Funds	5 Years	AB Intermediate New York Municipal Portfolio;Advisor	AllianceBernstein LP	10
New York Municipal Debt Funds	5 Years	Invesco Rochester New York Municipals Fund;R6	Invesco Advisers Inc	24
Options Arbitrage/Opt Strategies Funds	5 Years	Steward Covered Call Income Fund;Institutional	Crossmark Global Investments Inc	15
Pennsylvania Municipal Debt Funds	5 Years	Macquarie Tax-Free Pennsylvania Fund;Institutional	Delaware Management Co	15
Precious Metals Equity Funds	5 Years	OCM Gold Fund;Atlas	Orrell Capital Management Inc	17
Real Estate Funds	5 Years	PGIM US Real Estate Fund;R6	PGIM Investments LLC	51
Real Return Funds	5 Years	AB All Market Real Return Portfolio;Z	AllianceBernstein LP	19

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Retirement Income Funds	5 Years	American Funds Retirement Income Portfolio - Enhanced;R6	Capital Research and Management Co	18
Science & Technology Funds	5 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Company LLC	36
Short High Yield Funds	5 Years	Virtus Newfleet Short Duration High Income;R6	Virtus Investment Advisers LLC	18
Short Investment Grade Debt Funds	5 Years	Diamond Hill Short Duration Securitized Bond Fund;Y	Diamond Hill Capital Management Inc	86
Short Municipal Debt Funds	5 Years	Fidelity Flex Conservative Income Municipal Bond Fund	Fidelity Management & Research Company LLC	35
Short U.S. Government Funds	5 Years	Franklin Low Duration US Government Securities Fund;R6	Franklin Advisers Inc	16
Short-Intermediate Investment Grade Debt Funds	5 Years	Channel Income Fund	Channel Investment Partners LLC	38
Short-Intermediate Municipal Debt Funds	5 Years	Baird Strategic Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	22
Short-Intermediate U.S. Government Funds	5 Years	Loomis Sayles Limited Term Government and Agency;N	Loomis Sayles & Company LP	10
Small-Cap Core Funds	5 Years	Hennessy Cornerstone Mid Cap 30 Fund;Institutional	Hennessy Advisors Inc	270
Small-Cap Growth Funds	5 Years	Hood River Small-Cap Growth Fund;Retirement	Hood River Capital Management LLC	153
Small-Cap Value Funds	5 Years	Invesco Small Cap Value Fund;R6	Invesco Advisers Inc	48
U.S. Mortgage Funds	5 Years	Rational Special Situations Income Fund;Institutional	Rational Advisors Inc	35
Ultra-Short Obligations Funds	5 Years	Pioneer Multi-Asset Ultrashort Income Fund;K	Amundi Asset Management US Inc	44
Utility Funds	5 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Company LLC	13
Absolute Return Bond Funds	10 Years	Guggenheim Macro Opportunities Fund;Institutional	Guggenheim Partners Investment Mgmt LLC	16
Absolute Return Funds	10 Years	BNY Mellon Global Real Return Fund;Y	BNY Mellon Investment Adviser Inc	19
Alternative Credit Focus Funds	10 Years	Navigator Tactical Fixed Income Fund;I	Clark Capital Management Group Inc	16
Alternative Equity Market Neutral Funds	10 Years	JPMorgan Research Market Neutral Fund;I	JP Morgan Investment Management Inc	10
Alternative Event Driven Funds	10 Years	Camelot Event-Driven Fund;Institutional	Camelot Event-Driven Advisors LLC	11
Alternative Global Macro Funds	10 Years	Permanent Portfolio;I	Pacific Heights Asset Management LLC	34

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Alternative Long/Short Equity Funds	10 Years	AB Select US Long/Short Portfolio;I	AllianceBernstein LP	35
Alternative Managed Futures Funds	10 Years	Goldman Sachs Managed Futures Strategy Fund;Institutional	Goldman Sachs Asset Management LP	16
Alternative Multi-Strategy Funds	10 Years	Principal Global Multi-Strategy Fund;Institutional	Principal Global Investors LLC	16
California Intermediate Municipal Debt Funds	10 Years	Payden California Municipal Social Impact Fund;Investor	Payden & Rygel	16
California Municipal Debt Funds	10 Years	Invesco California Municipal Fund;Y	Invesco Advisers Inc	29
China Region Funds	10 Years	Fidelity China Region Fund	Fidelity Management & Research Company LLC	12
Commodities General Funds	10 Years	AQR Risk-Balanced Commodities Strategy Fund;R6	AQR Capital Management LLC	17
Convertible Securities Funds	10 Years	Franklin Convertible Securities Fund;R6	Franklin Advisers Inc	13
Core Bond Funds	10 Years	Calvert Core Bond Fund;A	Calvert Research and Management	103
Core Plus Bond Funds	10 Years	Weitz Core Plus Income Fund;Institutional	Weitz Investment Management Inc	50
Corporate Debt Funds BBB-Rated	10 Years	Federated Hermes Corporate Bond Strategy Portfolio	Federated Investment Management Co	46
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 Company LLC	124
Emerging Markets Hard Currency Debt Funds	10 Years	GMO Emerging Country Debt Fund;IV	Grantham, Mayo, Van Otterloo & Co. LLC	41
Emerging Markets Local Currency Debt Fds	10 Years	Eaton Vance Emerging Markets Debt Opportunities;R6	Eaton Vance Management	14
Energy MLP Funds	10 Years	Tortoise Energy Infrastructure Total Return Fund;Institutional	Tortoise Capital Advisors LLC	16
Equity Income Funds	10 Years	Buffalo Growth & Income Fund;Investor	Kornitzer Capital Management Inc	88
European Region Funds	10 Years	Brown Advisory-WMC Strategic European Equity Fund;Institutional	Brown Advisory LLC	15
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;I	North Square Investments LLC	15
Flexible Portfolio Funds	10 Years	Calamos Growth & Income Fund;I	Calamos Advisors LLC	85

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
General & Insured Municipal Debt Funds	10 Years	Invesco AMT-Free Municipal Income Fund;Y	Invesco Advisers Inc	70
General Bond Funds	10 Years	Western Asset SMASh Series C Fund	Franklin Templeton Fund Adviser LLC	12
General U.S. Government Funds	10 Years	American Funds US Government Securities Fund;R6	Capital Research and Management Co	13
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	19
Global High Yield Funds	10 Years	American Beacon SIM High Yield Opportunities;Y	American Beacon Advisors Inc	14
Global Income Funds	10 Years	Dodge & Cox Global Bond Fund;I	Dodge & Cox	39
Global Infrastructure Funds	10 Years	NYLI CBRE Global Infrastructure Fund;I	New York Life Investment Management LLC	14
Global Large-Cap Core	10 Years	Northern Global Sustainability Index Fund;I	Northern Trust Corp	12
Global Large-Cap Growth	10 Years	First Trust WCM Focused Global Growth Fund;Institutional	First Trust Advisors LP	31
Global Large-Cap Value	10 Years	Russell Investments Global Equity Fund;Y	Russell Investment Management LLC	12
Global Multi-Cap Core	10 Years	Franklin Global Equity Fund;I	Franklin Templeton Fund Adviser LLC	25
Global Multi-Cap Growth	10 Years	T. Rowe Price Global Stock Fund	T. Rowe Price Associates Inc	16
Global Multi-Cap Value	10 Years	AQR Global Equity Fund;R6	AQR Capital Management LLC	28
Global Natural Resources Funds	10 Years	PGIM Jennison Natural Resources Fund;R6	PGIM Investments LLC	14
Global Real Estate Funds	10 Years	PGIM Select Real Estate Fund;R6	PGIM Investments LLC	29
Global Small-/Mid-Cap Funds	10 Years	Yorktown Growth Fund;A	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	24
High Yield Funds	10 Years	Fidelity Capital & Income Fund	Fidelity Management & Research Company LLC	89
High Yield Municipal Debt Funds	10 Years	Invesco Rochester Municipal Opportunities Fund;Y	Invesco Advisers Inc	38

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Inflation Protected Bond Funds	10 Years	AB Bond Inflation Strategy;Advisor	AllianceBernstein LP	34
Intermediate Municipal Debt Funds	10 Years	Putnam Strategic Intermediate Municipal Fund;Y	Franklin Advisers Inc	47
Intermediate U.S. Government Funds	10 Years	Victory Government Securities Fund;Fund	Victory Capital Management Inc	11
International Equity Income Funds	10 Years	Janus Henderson Responsible International Dividend Fund;I	Janus Henderson Investors US LLC	11
International Income Funds	10 Years	PIMCO International Bond Fund (US Dollar-Hedged);Institutional	Pacific Investment Management Company LLC	14
International Large-Cap Core	10 Years	MFS International Equity Fund;R6	Massachusetts Financial Services Co	45
International Large-Cap Growth	10 Years	WCM Focused International Growth Fund;Institutional	WCM Investment Management LLC	57
International Large-Cap Value	10 Years	Artisan International Value Fund;Institutional	Artisan Partners LP	23
International Multi-Cap Core	10 Years	SEI Institutional Investments Screened World Equity Ex-US Fund;A	SEI Investments Management Corp	43
International Multi-Cap Growth	10 Years	Fidelity Overseas Fund;K	Fidelity Management & Research Company LLC	30
International Multi-Cap Value	10 Years	DFA International Vector Equity Portfolio;Institutional	Dimensional Fund Advisors LP	41
International Small/Mid-Cap Growth	10 Years	Fidelity Series International Small Cap Fund	Fidelity Management & Research Company LLC	35
Large-Cap Core Funds	10 Years	Elfun Trusts	SSgA Funds Management Inc	133
Large-Cap Growth Funds	10 Years	Fidelity Series Growth Company Fund	Fidelity Management & Research Company LLC	145
Large-Cap Value Funds	10 Years	Fidelity Advisor Mega Cap Stock Fund;Z	Fidelity Management & Research Company LLC	65
Loan Participation Funds	10 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Company 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;R6	Victory Capital Management Inc	70
Mid-Cap Growth Funds	10 Years	Federated Hermes MDT Mid Cap Growth Fund;Institutional	Federated MDTA LLC	79
Mid-Cap Value Funds	10 Years	Invesco Value Opportunities Fund;R5	Invesco Advisers Inc	30
Minnesota Municipal Debt Funds	10 Years	Macquarie Minnesota High-Yield Municipal Bond Fund;Institutional	Delaware Management Co	11

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
Mixed-Asset Target 2010 Funds	10 Years	T. Rowe Price Retirement 2010 Fund	T. Rowe Price Associates Inc	13
Mixed-Asset Target 2015 Funds	10 Years	T. Rowe Price Retirement 2015 Fund	T. Rowe Price Associates Inc	16
Mixed-Asset Target 2020 Funds	10 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates Inc	20
Mixed-Asset Target 2025 Funds	10 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates Inc	27
Mixed-Asset Target 2030 Funds	10 Years	T. Rowe Price Retirement 2030 Fund	T. Rowe Price Associates Inc	30
Mixed-Asset Target 2035 Funds	10 Years	American Funds 2035 Target Date Retirement Fund;R6	Capital Research and Management Co	29
Mixed-Asset Target 2040 Funds	10 Years	American Funds 2040 Target Date Retirement Fund;R6	Capital Research and Management Co	28
Mixed-Asset Target 2045 Funds	10 Years	American Funds 2045 Target Date Retirement Fund;R6	Capital Research and Management Co	29
Mixed-Asset Target 2050 Funds	10 Years	American Funds 2050 Target Date Retirement Fund;R6	Capital Research and Management Co	28
Mixed-Asset Target 2055 Funds	10 Years	BlackRock LifePath Dynamic 2055 Fund;K	BlackRock Fund Advisors	27
Mixed-Asset Target 2060 Funds	10 Years	Nuveen Lifecycle Index 2060 Fund;R6	Nuveen Fund Advisors LLC	13
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	JPMorgan Investor Growth Fund;I	JP Morgan Investment Management Inc	33
Mixed-Asset Target Allocation Conservative Funds	10 Years	T. Rowe Price Spectrum Conservative Allocation Fund	T. Rowe Price Associates Inc	62
Mixed-Asset Target Allocation Growth Funds	10 Years	T. Rowe Price Capital Appreciation Fund	T. Rowe Price Associates Inc	94
Mixed-Asset Target Allocation Moderate Funds	10 Years	George Putnam Balanced Fund;R6	Putnam Investment Management LLC	106
Mixed-Asset Target Today Funds	10 Years	BlackRock LifePath Dynamic Retirement Fund;K	BlackRock Fund Advisors	21
Multi-Cap Core Funds	10 Years	Natixis US Equity Opportunities Fund;Y	Natixis Advisors LLC	146
Multi-Cap Growth Funds	10 Years	Fidelity Advisor Series Growth Opportunities Fund	Fidelity Management & Research Company LLC	70
Multi-Cap Value Funds	10 Years	Schwab Fundamental US Large Company Index Fund	Charles Schwab Investment Management Inc	136
Multi-Sector Income Funds	10 Years	Credit Suisse Strategic Income Fund;I	UBS Asset Management (Americas) LLC	64
Natural Resources Funds	10 Years	Hennessy Energy Transition Fund;Institutional	Hennessy Advisors Inc	13

US Mutual Fund Classification	Best Fund	Fund Name	Company	Portfolio Count
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	23
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
Real Estate Funds	10 Years	Cohen & Steers Real Estate Securities Fund;Z	Cohen & Steers Capital Management Inc	45
Real Return Funds	10 Years	DWS RREEF Real Assets Fund;R6	DWS Investment Management Americas Inc	14
Retirement Income Funds	10 Years	Fidelity Advisor Managed Retirement 2025 Fund;I	Fidelity Management & Research Company LLC	13
Science & Technology Funds	10 Years	Fidelity Advisor Technology Fund;I	Fidelity Management & Research Company LLC	35
Short High Yield Funds	10 Years	NYLI MacKay Short Duration High Income Fund;I	New York Life Investment Management LLC	14
Short Investment Grade Debt Funds	10 Years	PIMCO Low Duration Income Fund;Institutional	Pacific Investment Management Company LLC	74
Short Municipal Debt Funds	10 Years	Invesco Short Term Municipal Fund;Y	Invesco Advisers Inc	28
Short U.S. Government Funds	10 Years	American Funds Short-Term Bond Fund of America;R6	Capital Research and Management Co	16
Short-Intermediate Investment Grade Debt Funds	10 Years	Channel Income Fund	Channel Investment Partners LLC	32
Short-Intermediate Municipal Debt Funds	10 Years	Eaton Vance Short Duration Municipal Opportunities Fund;I	Eaton Vance Management	19
Short-Intermediate U.S. Government Funds	10 Years	Loomis Sayles Limited Term Government and Agency;Y	Loomis Sayles & Company LP	10
Small-Cap Core Funds	10 Years	Thrivent Small Cap Stock Fund;S	Thrivent Asset Management LLC	234
Small-Cap Growth Funds	10 Years	Driehaus Micro Cap Growth Fund	Driehaus Capital Management LLC	129
Small-Cap Value Funds	10 Years	Invesco Small Cap Value Fund;Y	Invesco Advisers Inc	42
U.S. Mortgage Funds	10 Years	Morgan Stanley Mortgage Securities Trust;I	Morgan Stanley Investment Management Inc	28
Ultra-Short Obligations Funds	10 Years	Pioneer Multi-Asset Ultrashort Income Fund;K	Amundi Asset Management US Inc	31

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Utility Funds	10 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Company LLC	13