

LSEG | Lipper Fund Awards

UNITED STATES 2026

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	Nuveen
Equity	Small Company	Brandes
Fixed Income	Large Company	Columbia Threadneedle Investments
Fixed Income	Small Company	Brown Brothers Harriman
Mixed Assets	Large Company	Capital Group/American Funds
Mixed Assets	Small Company	First Eagle
Overall	Large Company	Nuveen
Overall	Small Company	Lord Abbett

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Bond Funds	3 Years	Columbia Mortgage Opportunities Fund;I3	Columbia Management Investment Advisers LLC	16
Absolute Return Funds	3 Years	Gotham Absolute Return Fund;Institutional	Gotham Asset Management LLC	33
Alternative Credit Focus Funds	3 Years	Robinson Opportunistic Income Fd;Inst	Liberty Street Advisors Inc	22
Alternative Equity Market Neutral Funds	3 Years	AQR Equity Market Neutral Fund;R6	AQR Capital Management LLC	15
Alternative Event Driven Funds	3 Years	Gabelli Enterprise Mergers & Acquisitions Fund;Y	Gabelli Funds LLC	15
Alternative Global Macro Funds	3 Years	Permanent Portfolio;I	Pacific Heights Asset Management LLC	31
Alternative Long/Short Equity Funds	3 Years	AQR Long-Short Equity Fund;R6	AQR Capital Management LLC	55
Alternative Managed Futures Funds	3 Years	Vest Bitcoin Strategy Mngd Vol Fund;Y	Vest Financial LLC	25
Alternative Multi-Strategy Funds	3 Years	Potomac Defensive Bull Fund	Potomac Fund Management Inc	47
California Intermdt Municipal Debt Funds	3 Years	Payden California Municipal Social Impact Fund;Investor	Payden & Rygel	15

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
California Municipal Debt Funds	3 Years	Franklin Templeton SMACS: Series CH	Franklin Advisers Inc	31
China Region Funds	3 Years	Fidelity Advisor China Region Fund;Z	Fidelity Management & Research Company LLC	17
Commodities General Funds	3 Years	AQR Risk-Balanced Commodities Strategy Fund;R6	AQR Capital Management LLC	24
Convertible Securities Funds	3 Years	Virtus Convertible Fund;R6	Virtus Investment Advisers LLC	16
Core Bond Funds	3 Years	Vanguard Intermediate-Term Investment-Grade Fund;Admiral	Vanguard Capital Management, LLC	121
Core Plus Bond Funds	3 Years	RBC BlueBay Core Plus Bond Fund;R6	RBC Global Asset Management (US) Inc	77
Corporate Debt Funds BBB-Rated	3 Years	John Hancock Managed Account Shares Investment-Grade Crp Bd Pf	John Hancock Investment Management LLC	59
Dedicated Short Bias Funds	3 Years	ProFunds Short Energy ProFund;Investor	ProFund Advisors LLC	28
Emerging Markets Funds	3 Years	Nomura Emerging Markets Fund;R6	Nomura Investment Management Business Trust	182
Emerging Markets Local Currency Debt Fds	3 Years	Eaton Vance Emerging Markets Debt Opportunities Fund;R6	Eaton Vance Management	14
Emerging Mrkts Hard Currency Debt Funds	3 Years	GMO Emerging Country Debt Fund;VI	Grantham, Mayo, Van Otterloo & Co. LLC	48
Energy MLP Funds	3 Years	Invesco SteelPath MLP Alpha Plus Fund;R6	Invesco Advisers Inc	20
Equity Income Funds	3 Years	Hodges Blue Chip Equity Income Fund;Rtl	Hodges Capital Management Inc	103
Financial Services Funds	3 Years	Davis Financial Fund;Y	Davis Selected Advisers LP	20
Flexible Income Funds	3 Years	North Square Preferred and Income Securities Fund;l	North Square Investments LLC	22
Flexible Portfolio Funds	3 Years	Teberg Fund	Absolute Capital Management LLC	129
General & Insured Municipal Debt Funds	3 Years	PIMCO Fixed Income SHares Series TE	Pacific Investment Management Company LLC	81
General Bond Funds	3 Years	CM Advisors Fixed Income Fund	Van Den Berg Management I Inc	29
General U.S. Government Funds	3 Years	Sit US Government Securities Fund;Y	Sit Investment Associates Inc	13
General U.S. Treasury Funds	3 Years	The Diplomat Fund	Embassy Asset Management LP	20
Global Equity Income Funds	3 Years	Thornburg Income Builder Fund;l	Thornburg Investment Management Inc	23

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global High Yield Funds	3 Years	T Rowe Price Global High Income Bond Fund;I	T.Rowe Price Associates Inc	17
Global Income Funds	3 Years	Artisan Global Unconstrained Fund;Inst	Artisan Partners LP	49
Global Infrastructure Funds	3 Years	Fidelity Infrastructure Fund	Fidelity Management & Research Company LLC	24
Global Large-Cap Core	3 Years	FI Inst Grp Stck Fd for Rtrmnt Plns	Fisher Asset Management LLC	24
Global Large-Cap Growth	3 Years	Marsico Global Fund;Institutional	Marsico Capital Management LLC	44
Global Large-Cap Value	3 Years	Artisan Global Value Fund;Institutional	Artisan Partners LP	16
Global Multi-Cap Core	3 Years	Franklin Global Equity Fund;IS	Franklin Templeton Fund Adviser LLC	32
Global Multi-Cap Growth	3 Years	Morgan Stanley Institutional Global Insight Prt;I	Morgan Stanley Investment Management Inc	31
Global Multi-Cap Value	3 Years	AQR Global Equity Fund;R6	AQR Capital Management LLC	33
Global Natural Resources Funds	3 Years	Goehring & Rozenchwajg Resources Fund;Institutional	Goehring & Rozenchwajg Associates LLC	18
Global Real Estate Funds	3 Years	Third Avenue Real Estate Value Fund;Z	Third Avenue Management LLC	29
Global Small-/Mid-Cap Funds	3 Years	Moerus Worldwide Value Fund;Institutional	Moerus Capital Management LLC	34
GNMA Funds	3 Years	PIMCO GNMA & GS Fund;Institutional	Pacific Investment Management Company LLC	11
Health/Biotechnology Funds	3 Years	Franklin Biotechnology Discovery Fund;R6	Franklin Advisers Inc	26
High Yield Funds	3 Years	Catalyst/SMH High Income Fund;I	Catalyst Capital Advisors LLC	104
High Yield Municipal Debt Funds	3 Years	Franklin Templeton SMACS: Series H	Franklin Advisers Inc	51
Inflation Protected Bond Funds	3 Years	Eaton Vance Short Duration Inflation-Protected Income Fund;I	Eaton Vance Management	45
Intermediate Municipal Debt Funds	3 Years	Brown Advisory Tax-Exempt Bond Fund;Inst	Brown Advisory LLC	53
Intermediate U.S. Government Funds	3 Years	Homestead Intermediate Bond Fund	Homestead Advisers Corp	13
International Equity Income Funds	3 Years	Cullen Emerging Markets High Dividend Fund;I	Cullen Capital Management LLC	15
International Income Funds	3 Years	Invesco International Bond Fund;R6	Invesco Advisers Inc	21

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Large-Cap Core	3 Years	PGIM Quant Solutions International Equity Fund;R6	PGIM Investments LLC	80
International Large-Cap Growth	3 Years	Marsico International Opportunities Fund;Instl	Marsico Capital Management LLC	85
International Large-Cap Value	3 Years	GMO International Equity Fund;IV	Grantham, Mayo, Van Otterloo & Co. LLC	30
International Multi-Cap Core	3 Years	GMO International Equity Allocation Fund;R6	Grantham, Mayo, Van Otterloo & Co. LLC	59
International Multi-Cap Growth	3 Years	Putnam Focused International Equity Fund;R6	Putnam Investment Management LLC	32
International Multi-Cap Value	3 Years	JPMorgan Developed International Value Fund;R6	JP Morgan Investment Management Inc	48
International Small/Mid-Cap Core	3 Years	WCM Focused Internatl Opp;Instl	WCM Investment Management LLC	20
International Small/Mid-Cap Growth	3 Years	Hood River International Opportunity Fund;Ret	Hood River Capital Management LLC	39
International Small/Mid-Cap Value	3 Years	Brandes International Small Cap Equity Fund;R6	Brandes Investment Partners LP	17
Large-Cap Core Funds	3 Years	Fidelity Contrafund;K	Fidelity Management & Research Company LLC	163
Large-Cap Growth Funds	3 Years	Alger Focus Equity Fund;Y	Fred Alger Management LLC	169
Large-Cap Value Funds	3 Years	Fidelity Advisor Capital Development Fund;I	Fidelity Management & Research Company LLC	53
Loan Participation Funds	3 Years	Barrow Hanley Floating Rate Fund;Inst	JOHCM (USA) Inc	46
Mid-Cap Core Funds	3 Years	Lyrical US Value Equity Fund;Institutional	Lyrical Asset Management LP	73
Mid-Cap Growth Funds	3 Years	Spyglass Growth Fund;Institutional	Spyglass Capital Management LLC	85
Mid-Cap Value Funds	3 Years	Invesco Value Opportunities Fund;R6	Invesco Advisers Inc	36
Minnesota Municipal Debt Funds	3 Years	Nomura Minnesota High-Yield Muni Bond Fund;Inst	Nomura Investment Management Business Trust	10
Mixed-Asset Target 2010 Funds	3 Years	T Rowe Price Retirement Blend 2010 Fund;I	T.Rowe Price Associates Inc	19
Mixed-Asset Target 2015 Funds	3 Years	T Rowe Price Retirement Blend 2015 Fund;I	T.Rowe Price Associates Inc	21
Mixed-Asset Target 2020 Funds	3 Years	T Rowe Price Retirement Blend 2020 Fund;I	T.Rowe Price Associates Inc	25
Mixed-Asset Target 2025 Funds	3 Years	Fidelity Freedom 2025 Fund;K6	Fidelity Management & Research Company LLC	31

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2030 Funds	3 Years	T Rowe Price Retirement Blend 2030 Fund;I	T.Rowe Price Associates Inc	42
Mixed-Asset Target 2035 Funds	3 Years	Putnam Retirement Advantage 2035 Fund;R6	Franklin Advisers Inc	40
Mixed-Asset Target 2040 Funds	3 Years	American Funds College 2039 Fund;529-F-3	Capital Research and Management Co	42
Mixed-Asset Target 2045 Funds	3 Years	Putnam Retirement Advantage 2045 Fund;R6	Franklin Advisers Inc	40
Mixed-Asset Target 2050 Funds	3 Years	Putnam Retirement Advantage 2050 Fund;R6	Franklin Advisers Inc	40
Mixed-Asset Target 2055 Funds	3 Years	Putnam Retirement Advantage 2055 Fund;R6	Franklin Advisers Inc	39
Mixed-Asset Target 2060 Funds	3 Years	Putnam Retirement Advantage 2060 Fund;R6	Franklin Advisers Inc	39
Mixed-Asset Target 2060+ Funds	3 Years	Putnam Retirement Advantage 2065 Fund;R6	Franklin Advisers Inc	66
Mixed-Asset Target Alloc Agg Gro Funds	3 Years	Allspring Diversified Cap Bldr Fd;I	Allspring Funds Management LLC	38
Mixed-Asset Target Alloc Consv Funds	3 Years	Federated Hermes Capital Income Fund;Institutional	Federated Equity Management Company of Pennsylvania	78
Mixed-Asset Target Alloc Growth Funds	3 Years	Value Line Capital Appreciation Fund;Institutional	EULAV Asset Management	118
Mixed-Asset Target Alloc Moderate Funds	3 Years	MoA Balanced Fund	Mutual of America Capital Management LLC	119
Mixed-Asset Target Today Funds	3 Years	JPMorgan SmartRetirement Blend Income Fund;R6	JP Morgan Investment Management Inc	29
Multi-Cap Core Funds	3 Years	Permanent Portfolio Aggressive Growth Portfolio;I	Pacific Heights Asset Management LLC	164
Multi-Cap Growth Funds	3 Years	One Rock Fund	Wrona Investment Management LLC	88
Multi-Cap Value Funds	3 Years	Artisan Select Equity Fund;Institutional	Artisan Partners LP	164
Multi-Sector Income Funds	3 Years	Columbia Multisector Bond SMA Completion Port	Columbia Management Investment Advisers LLC	106
New Jersey Municipal Debt Funds	3 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund;Admiral	Vanguard Capital Management, LLC	12
New York Municipal Debt Funds	3 Years	MFS New York Municipal Bond Fund;R6	Massachusetts Financial Services Co	23
Options Arbitrage/Opt Strategies Funds	3 Years	Goldman Sachs Global Managed Beta Fund;Inst	Goldman Sachs Asset Management LP	25
Pennsylvania Municipal Debt Funds	3 Years	Nomura Tax-Free Pennsylvania Fund;Institutional	Nomura Investment Management Business Trust	13

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Precious Metals Equity Funds	3 Years	Franklin Gold and Precious Metals Fund;R6	Franklin Advisers Inc	17
Real Estate Funds	3 Years	Baron Real Estate Fund;Institutional	BAMCO INC	49
Real Return Funds	3 Years	First Eagle Global Real Assets Fund;R6	First Eagle Investment Management LLC	18
Science & Technology Funds	3 Years	Fidelity Advisor Semiconductors Fund;Z	Fidelity Management & Research Company LLC	36
Short High Yield Funds	3 Years	Lord Abbett Short Duration High Yield;F3	Lord Abbett & Co LLC	18
Short Investment Grade Debt Funds	3 Years	Diamond Hill Short Duration Securitized Bond Fd;Y	Diamond Hill Capital Management Inc	99
Short Municipal Debt Funds	3 Years	BlackRock Short Duration Muni Fund;K	BlackRock Advisors LLC	40
Short U.S. Government Funds	3 Years	Integrity Short Term Government Fund;I	Viking Fund Management LLC	14
Short-Intermediate U.S. Government Funds	3 Years	Eaton Vance Government Opportunities Fund;I	Boston Management And Research	10
Short-Intmtd Investment Grade Debt Funds	3 Years	Thompson Bond Fund	Thompson Investment Management Inc	37
Short-Intmtd Municipal Debt Funds	3 Years	Baird Strategic Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	24
Small-Cap Core Funds	3 Years	WesMark Small Company Fund	WesBanco Bank Inc	271
Small-Cap Growth Funds	3 Years	Calamos Timpani SMID Fund;R6	Calamos Advisors LLC	134
Small-Cap Value Funds	3 Years	Brandes Small Cap Value Fund;R6	Brandes Investment Partners LP	53
U.S. Mortgage Funds	3 Years	Medalist Partners MBS Total Return Fund;Inst	Medalist Partners LP	47
Ultra-Short Obligations Funds	3 Years	Guggenheim Ultra Short Duration;Institutional	Guggenheim Partners Investment Mgmt LLC	45
Utility Funds	3 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Company LLC	13
Absolute Return Bond Funds	5 Years	Calvert Flexible Bond Fund;R6	Calvert Research and Management	16
Absolute Return Funds	5 Years	AQR Alternative Risk Premia Fund;R6	AQR Capital Management LLC	33
Alternative Credit Focus Funds	5 Years	Robinson Opportunistic Income Fd;Inst	Liberty Street Advisors Inc	22
Alternative Equity Market Neutral Funds	5 Years	AQR Equity Market Neutral Fund;R6	AQR Capital Management LLC	15

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
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;l	Pacific Heights Asset Management LLC	31
Alternative Long/Short Equity Funds	5 Years	AQR Long-Short Equity Fund;R6	AQR Capital Management LLC	55
Alternative Managed Futures Funds	5 Years	AQR Managed Futures Strategy HV Fund;R6	AQR Capital Management LLC	25
Alternative Multi-Strategy Funds	5 Years	AQR Diversifying Strategies Fund;R6	AQR Capital Management LLC	47
California Intermdt Municipal Debt Funds	5 Years	Payden California Municipal Social Impact Fund;Investor	Payden & Rygel	15
California Municipal Debt Funds	5 Years	John Hancock California Municipal Bond Fund;R6	John Hancock Investment Management LLC	31
China Region Funds	5 Years	Fidelity Advisor China Region Fund;Z	Fidelity Management & Research Company LLC	17
Commodities General Funds	5 Years	AQR Risk-Balanced Commodities Strategy Fund;R6	AQR Capital Management LLC	24
Convertible Securities Funds	5 Years	Fidelity Advisor Convertible Securities Fund;Z	Fidelity Management & Research Company LLC	16
Core Bond Funds	5 Years	Bramshill Income Performance Fund;Inst	Bramshill Investments LLC	121
Core Plus Bond Funds	5 Years	Regan Total Return Income Fund;Institutional	Regan Capital LLC	77
Corporate Debt Funds BBB-Rated	5 Years	ICON Flexible Bond Fund;Institutional	Shelton Capital Management	59
Dedicated Short Bias Funds	5 Years	ProFunds Short Real Estate ProFund;Investor	ProFund Advisors LLC	28
Emerging Markets Funds	5 Years	LSV Emerging Markets Equity Fund;Inst	LSV Asset Management	182
Emerging Markets Local Currency Debt Fds	5 Years	Eaton Vance Emerging Markets Debt Opportunities Fund;R6	Eaton Vance Management	14
Emerging Mrkts Hard Currency Debt Funds	5 Years	American Beacon Developing World Income Fund;R5	American Beacon Advisors Inc	48
Energy MLP Funds	5 Years	Invesco SteelPath MLP Alpha Plus Fund;R6	Invesco Advisers Inc	20
Equity Income Funds	5 Years	Hodges Blue Chip Equity Income Fund;Rtl	Hodges Capital Management Inc	103
Financial Services Funds	5 Years	Davis Financial Fund;Y	Davis Selected Advisers LP	20
Flexible Income Funds	5 Years	Fairholme Focused Income Fund	Fairholme Capital Management LLC	22

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Flexible Portfolio Funds	5 Years	Matisse Discounted Closed-End Fund Strategy;Institutional	Deschutes Portfolio Strategy LLC	129
General & Insured Municipal Debt Funds	5 Years	PIMCO Fixed Income SHares Series TE	Pacific Investment Management Company LLC	81
General Bond Funds	5 Years	CM Advisors Fixed Income Fund	Van Den Berg Management I Inc	29
General U.S. Government Funds	5 Years	Sit US Government Securities Fund;Y	Sit Investment Associates Inc	13
General U.S. Treasury Funds	5 Years	Vanguard Intermediate-Term Treasury Fund;Admiral	Vanguard Capital Management, LLC	20
Global Equity Income Funds	5 Years	Thornburg Income Builder Fund;I	Thornburg Investment Management Inc	23
Global High Yield Funds	5 Years	PIMCO High Yield Spectrum Fund;Institutional	Pacific Investment Management Company LLC	17
Global Income Funds	5 Years	Dodge & Cox Global Bond Fund;I	Dodge & Cox	49
Global Infrastructure Funds	5 Years	Fidelity Infrastructure Fund	Fidelity Management & Research Company LLC	24
Global Large-Cap Core	5 Years	FI Inst Grp Stck Fd for Rtrmnt Plns	Fisher Asset Management LLC	24
Global Large-Cap Growth	5 Years	FI Inst Grp ESG Stck Fd for Rtrmnt Plns	Fisher Asset Management LLC	44
Global Large-Cap Value	5 Years	Artisan Global Value Fund;Institutional	Artisan Partners LP	16
Global Multi-Cap Core	5 Years	Franklin Global Equity Fund;IS	Franklin Templeton Fund Adviser LLC	32
Global Multi-Cap Growth	5 Years	American Funds New Economy Fund;R6	Capital Research and Management Co	31
Global Multi-Cap Value	5 Years	Vanguard Global Capital Cycles Fund;Investor	Wellington Management Company LLP	33
Global Natural Resources Funds	5 Years	Victory Global Energy Transition Fund;Y	Victory Capital Management Inc	18
Global Real Estate Funds	5 Years	Third Avenue Real Estate Value Fund;Z	Third Avenue Management LLC	29
Global Small-/Mid-Cap Funds	5 Years	Moerus Worldwide Value Fund;Institutional	Moerus Capital Management LLC	34
GNMA Funds	5 Years	Victory Fund for Income;R6	Victory Capital Management Inc	11
Health/Biotechnology Funds	5 Years	PGIM Jennison Health Sciences Fund;R6	PGIM Investments LLC	26
High Yield Funds	5 Years	Fidelity Capital & Income Fund	Fidelity Management & Research Company LLC	104

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
High Yield Municipal Debt Funds	5 Years	First Eagle High Yield Municipal Fund;I	First Eagle Investment Management LLC	51
Inflation Protected Bond Funds	5 Years	Eaton Vance Short Duration Inflation-Protected Income Fund;I	Eaton Vance Management	45
Intermediate Municipal Debt Funds	5 Years	AB Municipal Bond Inflation Strategy;2	AllianceBernstein LP	53
Intermediate U.S. Government Funds	5 Years	Dupree Intermediate Government Bond Series	Dupree & Company Inc	13
International Equity Income Funds	5 Years	Vanguard International High Dividend Yield Index Fund;Admiral	Vanguard Capital Management, LLC	15
International Income Funds	5 Years	Dunham International Opportunity Bond Fund;N	Dunham & Associates Investment Counsel Inc	21
International Large-Cap Core	5 Years	Transamerica International Stock;R6	Transamerica Asset Management Inc	80
International Large-Cap Growth	5 Years	Fidelity SAI International Momentum Index	Fidelity Management & Research Company LLC	85
International Large-Cap Value	5 Years	GMO International Equity Fund;IV	Grantham, Mayo, Van Otterloo & Co. LLC	30
International Multi-Cap Core	5 Years	AQR International Multi-Style Fund;R6	AQR Capital Management LLC	59
International Multi-Cap Growth	5 Years	Putnam Focused International Equity Fund;R6	Putnam Investment Management LLC	32
International Multi-Cap Value	5 Years	JPMorgan Developed International Value Fund;R6	JP Morgan Investment Management Inc	48
International Small/Mid-Cap Core	5 Years	Nuveen Quant International Small Cap Eqty Fd;W	Teachers Advisors LLC	20
International Small/Mid-Cap Growth	5 Years	Nationwide International Small Cap Fund;R6I	Nationwide Fund Advisors	39
International Small/Mid-Cap Value	5 Years	Brandes International Small Cap Equity Fund;R6	Brandes Investment Partners LP	17
Large-Cap Core Funds	5 Years	Meehan Focus Fund	Edgemoor Investment Advisors Inc	163
Large-Cap Growth Funds	5 Years	Alger Focus Equity Fund;Y	Fred Alger Management LLC	169
Large-Cap Value Funds	5 Years	Fidelity Large Cap Stock K6 Fund	Fidelity Management & Research Company LLC	53
Loan Participation Funds	5 Years	T Rowe Price Institutional Floating Rate Fund;Z	T.Rowe Price Associates Inc	46
Mid-Cap Core Funds	5 Years	Fidelity Advisor Mid Cap Value Fund;Z	Fidelity Management & Research Company LLC	73
Mid-Cap Growth Funds	5 Years	Federated Hermes MDT Mid Cap Growth Fund;R6	Federated MDTA LLC	85

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mid-Cap Value Funds	5 Years	Invesco Value Opportunities Fund;R6	Invesco Advisers Inc	36
Minnesota Municipal Debt Funds	5 Years	Nomura Minnesota High-Yield Muni Bond Fund;Inst	Nomura Investment Management Business Trust	10
Mixed-Asset Target 2010 Funds	5 Years	American Funds 2010 Target Date Retirement Income Fund;F3	Capital Research and Management Co	19
Mixed-Asset Target 2015 Funds	5 Years	American Funds 2015 Target Date Retirement Income Fund;R6	Capital Research and Management Co	21
Mixed-Asset Target 2020 Funds	5 Years	American Funds 2020 Target Date Retirement Income Fund;F3	Capital Research and Management Co	25
Mixed-Asset Target 2025 Funds	5 Years	American Funds 2025 Target Date Retirement Income Fund;F3	Capital Research and Management Co	31
Mixed-Asset Target 2030 Funds	5 Years	Franklin LifeSmart 2030 Retirement Target Fund;R6	Franklin Advisers Inc	42
Mixed-Asset Target 2035 Funds	5 Years	Putnam Retirement Advantage 2035 Fund;R6	Franklin Advisers Inc	40
Mixed-Asset Target 2040 Funds	5 Years	Putnam Retirement Advantage 2040 Fund;R6	Franklin Advisers Inc	42
Mixed-Asset Target 2045 Funds	5 Years	Putnam Retirement Advantage 2045 Fund;R6	Franklin Advisers Inc	40
Mixed-Asset Target 2050 Funds	5 Years	Putnam Retirement Advantage 2050 Fund;R6	Franklin Advisers Inc	40
Mixed-Asset Target 2055 Funds	5 Years	Putnam Retirement Advantage 2055 Fund;R6	Franklin Advisers Inc	39
Mixed-Asset Target 2060 Funds	5 Years	Putnam Retirement Advantage 2060 Fund;R6	Franklin Advisers Inc	39
Mixed-Asset Target 2060+ Funds	5 Years	DFA Dimensional 2065 Target Date Ret Inc Fd;Inst	Dimensional Fund Advisors LP	66
Mixed-Asset Target Alloc Agg Gro Funds	5 Years	Allspring Diversified Cap Bldr Fd;I	Allspring Funds Management LLC	38
Mixed-Asset Target Alloc Consv Funds	5 Years	Saratoga Conservative Balanced Allocation Port;I	Saratoga Capital Management LLC	78
Mixed-Asset Target Alloc Growth Funds	5 Years	Davis Balanced Fund;Y	Davis Selected Advisers LP	118
Mixed-Asset Target Alloc Moderate Funds	5 Years	MoA Balanced Fund	Mutual of America Capital Management LLC	119
Mixed-Asset Target Today Funds	5 Years	JPMorgan SmartRetirement Blend Income Fund;R6	JP Morgan Investment Management Inc	29
Multi-Cap Core Funds	5 Years	Midas Special Opportunities	Midas Management Corporation	164
Multi-Cap Growth Funds	5 Years	One Rock Fund	Wrona Investment Management LLC	88

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Multi-Cap Value Funds	5 Years	BNY Mellon Dynamic Value Fund;Y	BNY Mellon Investment Adviser Inc	164
Multi-Sector Income Funds	5 Years	Columbia Multisector Bond SMA Completion Port	Columbia Management Investment Advisers LLC	106
New Jersey Municipal Debt Funds	5 Years	Invesco New Jersey Municipal Fund;R6	Invesco Advisers Inc	12
New York Municipal Debt Funds	5 Years	BlackRock New York Municipal Opportunities;K	BlackRock Advisors LLC	23
Options Arbitrage/Opt Strategies Funds	5 Years	Steward Covered Call Income Fund;Institutional	Crossmark Global Investments Inc	25
Pennsylvania Municipal Debt Funds	5 Years	Nomura Tax-Free Pennsylvania Fund;Institutional	Nomura Investment Management Business Trust	13
Precious Metals Equity Funds	5 Years	Allspring Precious Metals Fund;Inst	Allspring Funds Management LLC	17
Real Estate Funds	5 Years	PGIM US Real Estate Fund;R6	PGIM Investments LLC	49
Real Return Funds	5 Years	John Hancock Diversified Real Assets Fund;NAV	John Hancock Investment Management LLC	18
Science & Technology Funds	5 Years	Fidelity Advisor Semiconductors Fund;Z	Fidelity Management & Research Company LLC	36
Short High Yield Funds	5 Years	Intrepid Income Fund;Institutional	Intrepid Capital Management Inc	18
Short Investment Grade Debt Funds	5 Years	Diamond Hill Short Duration Securitized Bond Fd;Y	Diamond Hill Capital Management Inc	99
Short Municipal Debt Funds	5 Years	abrdrn Ultra Short Municipal Income Fund;Inst	Abrdrn Inc	40
Short U.S. Government Funds	5 Years	Integrity Short Term Government Fund;I	Viking Fund Management LLC	14
Short-Intermediate U.S. Government Funds	5 Years	Eaton Vance Government Opportunities Fund;I	Boston Management And Research	10
Short-Intmdt Investment Grade Debt Funds	5 Years	Thompson Bond Fund	Thompson Investment Management Inc	37
Short-Intmdt Municipal Debt Funds	5 Years	Baird Strategic Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	24
Small-Cap Core Funds	5 Years	Auer Growth Fund	SBAuer Funds LLC	271
Small-Cap Growth Funds	5 Years	FullerThaler Behavioral Sml-Cp Growth Fund;R6	Fuller & Thaler Asset Management Inc	134
Small-Cap Value Funds	5 Years	Brandes Small Cap Value Fund;R6	Brandes Investment Partners LP	53
U.S. Mortgage Funds	5 Years	Victory Pioneer Securitized Income Fund;Y	Victory Capital Management Inc	47

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Ultra-Short Obligations Funds	5 Years	Victory Pioneer Multi-Asset Ultrashort Inc Fd;R6	Victory Capital Management Inc	45
Utility Funds	5 Years	Fidelity Select Utilities Portfolio	Fidelity Management & Research Company LLC	13
Absolute Return Bond Funds	10 Years	AQR Diversified Arbitrage Fund;R6	AQR Capital Management LLC	16
Absolute Return Funds	10 Years	Calamos Hedged Equity Fund;I	Calamos Advisors LLC	33
Alternative Credit Focus Funds	10 Years	Touchstone Ares Credit Opportunities Fund;Institutional	Touchstone Advisors Inc	22
Alternative Event Driven Funds	10 Years	Camelot Event-Driven Fund;Institutional	Camelot Event-Driven Advisors LLC	15
Alternative Global Macro Funds	10 Years	Permanent Portfolio;I	Pacific Heights Asset Management LLC	31
Alternative Long/Short Equity Funds	10 Years	Gotham Enhanced Return Fund;Institutional	Gotham Asset Management LLC	55
Alternative Managed Futures Funds	10 Years	Campbell Systematic Macro Fund;I	Campbell & Investment Adviser Co LLC	25
Alternative Multi-Strategy Funds	10 Years	SMI Multi-Strategy Fund	SMI Advisory Services LLC	47
California Intermdt 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	31
Commodities General Funds	10 Years	AQR Risk-Balanced Commodities Strategy Fund;R6	AQR Capital Management LLC	24
Convertible Securities Funds	10 Years	Virtus Convertible Fund;Institutional	Virtus Investment Advisers LLC	16
Core Bond Funds	10 Years	Calvert Core Bond Fund;A	Calvert Research and Management	121
Core Plus Bond Funds	10 Years	Eaton Vance Total Return Bond Fund;I	Boston Management And Research	77
Corporate Debt Funds BBB-Rated	10 Years	Federated Hermes Corporate Bond Strategy Portfolio	Federated Investment Management Co	59
Dedicated Short Bias Funds	10 Years	Rydex Inverse Russell 2000 Strategy Fund;H	Security Investors LLC	28
Emerging Markets Funds	10 Years	Ashmore Emerging Markets Equity Fund;Institutional	Ashmore Investment Advisors Limited	182
Emerging Markets Local Currency Debt Fds	10 Years	Eaton Vance Emerging Markets Debt Opportunities Fund;R6	Eaton Vance Management	14
Emerging Mrkts Hard Currency Debt Funds	10 Years	American Beacon Developing World Income Fund;R5	American Beacon Advisors Inc	48

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Energy MLP Funds	10 Years	Eagle Energy Infrastructure Fund;I	Eagle Global Advisors LLC	20
Equity Income Funds	10 Years	BNY Mellon Equity Income Fund;Y	BNY Mellon Investment Adviser Inc	103
Financial Services Funds	10 Years	T Rowe Price Financial Services Fund	T.Rowe Price Associates Inc	20
Flexible Income Funds	10 Years	PIMCO Preferred and Capital Securities Fund;Institutional	Pacific Investment Management Company LLC	22
Flexible Portfolio Funds	10 Years	Teberg Fund	Absolute Capital Management LLC	129
General & Insured Municipal Debt Funds	10 Years	PIMCO Fixed Income SHares Series TE	Pacific Investment Management Company LLC	81
General U.S. Government Funds	10 Years	American Funds US Government Securities Fund;R6	Capital Research and Management Co	13
Global Equity Income Funds	10 Years	Fidelity Global Equity Income Fund	Fidelity Management & Research Company LLC	23
Global High Yield Funds	10 Years	PIMCO High Yield Spectrum Fund;Institutional	Pacific Investment Management Company LLC	17
Global Income Funds	10 Years	Dodge & Cox Global Bond Fund;I	Dodge & Cox	49
Global Infrastructure Funds	10 Years	John Hancock Infrastructure Fund;NAV	John Hancock Investment Management LLC	24
Global Large-Cap Core	10 Years	Northern World Selection Index Fund;I	Northern Trust Corp	24
Global Large-Cap Growth	10 Years	First Trust WCM Focused Global Growth Fund;Inst	First Trust Advisors LP	44
Global Large-Cap Value	10 Years	Artisan Global Value Fund;Institutional	Artisan Partners LP	16
Global Multi-Cap Core	10 Years	Franklin Global Equity Fund;I	Franklin Templeton Fund Adviser LLC	32
Global Multi-Cap Growth	10 Years	American Funds New Economy Fund;R6	Capital Research and Management Co	31
Global Multi-Cap Value	10 Years	Victory Pioneer Global Equity Fund;Y	Victory Capital Management Inc	33
Global Natural Resources Funds	10 Years	PGIM Jennison Natural Resources Fund;R6	PGIM Investments LLC	18
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;Institutional	Yorktown Management & Research Co Inc	34
GNMA Funds	10 Years	PIMCO GNMA & GS Fund;Institutional	Pacific Investment Management Company LLC	11

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Health/Biotechnology Funds	10 Years	Nomura Healthcare Fund;Institutional	Nomura Investment Management Business Trust	26
High Yield Funds	10 Years	Catalyst/SMH High Income Fund;I	Catalyst Capital Advisors LLC	104
High Yield Municipal Debt Funds	10 Years	Invesco Rochester Municipal Opportunities Fund;Y	Invesco Advisers Inc	51
Inflation Protected Bond Funds	10 Years	AB Bond Inflation Strategy;Advisor	AllianceBernstein LP	45
Intermediate Municipal Debt Funds	10 Years	Putnam Strategic Intermediate Municipal Fund;Y	Franklin Advisers Inc	53
Intermediate U.S. Government Funds	10 Years	Victory Government Securities Fund;Institutional	Victory Capital Management Inc	13
International Income Funds	10 Years	PIMCO Intl Bond Fund (US Dollar-Hedged);Institutional	Pacific Investment Management Company LLC	21
International Large-Cap Core	10 Years	Touchstone Non-US Equity Fund;Institutional	Touchstone Advisors Inc	80
International Large-Cap Growth	10 Years	WCM Focused International Growth Fund;Institutional	WCM Investment Management LLC	85
International Large-Cap Value	10 Years	Dunham International Stock Fund;N	Dunham & Associates Investment Counsel Inc	30
International Multi-Cap Core	10 Years	Mercer Non-US Core Equity Fund;Y-3	Mercer Investments LLC	59
International Multi-Cap Growth	10 Years	Clearwater International Fund	Clearwater Management Co Inc	32
International Multi-Cap Value	10 Years	Hartford International Value Fund;Y	Hartford Funds Management Company LLC	48
International Small/Mid-Cap Core	10 Years	Voya Multi-Manager International Small Cap Fund;I	Voya Investments LLC	20
International Small/Mid-Cap Growth	10 Years	Driehaus International Small Cap Growth Fund	Driehaus Capital Management LLC	39
International Small/Mid-Cap Value	10 Years	Causeway International Small Cap Fund;Institutional	Causeway Capital Management LLC	17
Large-Cap Core Funds	10 Years	Elfun Trusts	SSgA Funds Management Inc	163
Large-Cap Growth Funds	10 Years	Fidelity Series Growth Company Fund	Fidelity Management & Research Company LLC	169
Large-Cap Value Funds	10 Years	Fidelity Large Cap Stock Fund	Fidelity Management & Research Company LLC	53
Loan Participation Funds	10 Years	Fidelity Series Floating Rate High Income Fund	Fidelity Management & Research Company LLC	46
Mid-Cap Core Funds	10 Years	Fidelity Mid-Cap Stock Fund;K	Fidelity Management & Research Company LLC	73

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mid-Cap Growth Funds	10 Years	Federated Hermes MDT Mid Cap Growth Fund;Institutional	Federated MDTA LLC	85
Mid-Cap Value Funds	10 Years	Invesco Value Opportunities Fund;Y	Invesco Advisers Inc	36
Mixed-Asset Target 2010 Funds	10 Years	T Rowe Price Retirement 2010 Fund	T.Rowe Price Associates Inc	19
Mixed-Asset Target 2015 Funds	10 Years	T Rowe Price Retirement 2015 Fund	T.Rowe Price Associates Inc	21
Mixed-Asset Target 2020 Funds	10 Years	T Rowe Price Retirement 2020 Fund	T.Rowe Price Associates Inc	25
Mixed-Asset Target 2025 Funds	10 Years	T Rowe Price Retirement 2025 Fund	T.Rowe Price Associates Inc	31
Mixed-Asset Target 2030 Funds	10 Years	American Funds 2030 Target Date Retirement Fund;R6	Capital Research and Management Co	42
Mixed-Asset Target 2035 Funds	10 Years	American Funds 2035 Target Date Retirement Fund;R6	Capital Research and Management Co	40
Mixed-Asset Target 2040 Funds	10 Years	American Funds 2040 Target Date Retirement Fund;R6	Capital Research and Management Co	42
Mixed-Asset Target 2045 Funds	10 Years	American Funds 2045 Target Date Retirement Fund;R6	Capital Research and Management Co	40
Mixed-Asset Target 2050 Funds	10 Years	DFA Dimensional 2050 Target Date Retirement Income Fund;Inst	Dimensional Fund Advisors LP	40
Mixed-Asset Target 2055 Funds	10 Years	DFA Dimensional 2055 Target Date Retirement Income Fund;Inst	Dimensional Fund Advisors LP	39
Mixed-Asset Target 2060 Funds	10 Years	DFA Dimensional 2060 Target Date Retirement Income Fund;Inst	Dimensional Fund Advisors LP	39
Mixed-Asset Target Alloc Agg Gro Funds	10 Years	Allspring Diversified Cap Bldr Fd;I	Allspring Funds Management LLC	38
Mixed-Asset Target Alloc Consv Funds	10 Years	Fidelity Asset Manager 40%	Fidelity Management & Research Company LLC	78
Mixed-Asset Target Alloc Growth Funds	10 Years	Calamos Growth & Income Fund;I	Calamos Advisors LLC	118
Mixed-Asset Target Alloc Moderate Funds	10 Years	George Putnam Balanced Fund;R6	Putnam Investment Management LLC	119
Mixed-Asset Target Today Funds	10 Years	BlackRock LifePath Dynamic Retirement Fund;K	BlackRock Fund Advisors	29
Multi-Cap Core Funds	10 Years	Federated Hermes MDT All Cap Core Fund;Institutional	Federated MDTA LLC	164
Multi-Cap Growth Funds	10 Years	Fidelity Advisor Growth Opportunities Fund;Z	Fidelity Management & Research Company LLC	88
Multi-Cap Value Funds	10 Years	Schwab Fundamental US Large Company Index Fund	Charles Schwab Investment Management Inc	164

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Multi-Sector Income Funds	10 Years	Nationwide Strategic Income Fund;R6	Nationwide Fund Advisors	106
New Jersey Municipal Debt Funds	10 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund;Admiral	Vanguard Capital Management, LLC	12
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	13
Precious Metals Equity Funds	10 Years	OCM Gold Fund;Atlas	Orrell Capital Management Inc	17
Real Estate Funds	10 Years	PGIM US Real Estate Fund;Z	PGIM Investments LLC	49
Real Return Funds	10 Years	T Rowe Price Real Assets Fund;I	T.Rowe Price Associates Inc	18
Science & Technology Funds	10 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Company LLC	36
Short High Yield Funds	10 Years	Intrepid Income Fund;Institutional	Intrepid Capital Management Inc	18
Short Investment Grade Debt Funds	10 Years	PIMCO Low Duration Income Fund;Institutional	Pacific Investment Management Company LLC	99
Short Municipal Debt Funds	10 Years	Baird Short-Term Municipal Bond Fund;Institutional	Robert W. Baird & Co Inc	40
Short U.S. Government Funds	10 Years	Eaton Vance Short Duration Government Income Fund;I	Boston Management And Research	14
Short-Intermediate U.S. Government Funds	10 Years	Eaton Vance Government Opportunities Fund;I	Boston Management And Research	10
Short-Intmdt Investment Grade Debt Funds	10 Years	Channel Income Fund	Channel Investment Partners LLC	37
Short-Intmdt Municipal Debt Funds	10 Years	Parametric TABS 1-to-10 Year Laddered Municipal Bond Fund;I	Eaton Vance Management	24
Small-Cap Core Funds	10 Years	Oberweis Micro-Cap Fund;Investor	Oberweis Asset Management Inc	271
Small-Cap Growth Funds	10 Years	Putnam Small Cap Growth Fund;R6	Putnam Investment Management LLC	134
Small-Cap Value Funds	10 Years	PIMCO RAE PLUS Small Fund;Institutional	Pacific Investment Management Company LLC	53
U.S. Mortgage Funds	10 Years	BATS: Securitized Total Return Series	BlackRock Advisors LLC	47
Ultra-Short Obligations Funds	10 Years	Victory Pioneer Multi-Asset Ultrashort Inc Fd;R6	Victory Capital Management Inc	45

US MUTUAL FUND CLASSIFICATION

BEST FUND FUND NAME

COMPANY

PORTFOLIO COUNT

Utility Funds

10 Years

Fidelity Select Utilities Portfolio

Fidelity Management & Research Company LLC

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