

# LIPPER

## FUND AWARDS 2014

UNITED STATES WINNER LIST  
Thursday, 20 March 2014

GROUP AWARD	SIZE	COMPANY
Overall	Large	TIAA-CREF
Overall	Small	MassMutual Retirement Services
Equity	Large	Oakmark Family of Funds
Equity	Small	LSV Asset Management
Fixed Income	Large	USAA Investment Management Company
Fixed Income	Small	Commerce Investment Advisors, Inc.
Mixed Assets	Large	T. Rowe Price Associates, Inc.
Mixed Assets	Small	MassMutual Retirement Services

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Small-Cap Value Funds	3 Years	Small Cap Value Fund Inc	Adams Asset Investors, LLC	233
Inflation-Protected Bond Funds	3 Years	Allianz Fixed Income Shares Series R	PIMCO	158
Convertible Securities Funds	3 Years	AllianzGI Convertible Fund, Institutional	Allianz Global Investors	62
Alternative Multi-Strategy Funds	3 Years	AmericaFirst Quantitative Strategies Fund, A	America First Capital Management, LLC	36
Mixed-Asset Target Today Funds	3 Years	American Century One Choice In Retirement Portfolio, Institutional	American Century Investment Management, Inc.	129
International Large-Cap Growth Funds	3 Years	Artisan International Fund, Institutional	Artisan Partners, LP	122
International Multi-Cap Core Funds	3 Years	Artisan International Value Fund, Institutional	Artisan Partners, LP	298
Real Estate Funds	3 Years	Baron Real Estate Fund, Institutional	BAMCO, Inc.	189
Global Equity Income Funds	3 Years	BlackRock Global Dividend Portfolio, Institutional	BlackRock, Inc.	59
Intermediate Municipal Debt Funds	3 Years	BlackRock Intermediate Municipal Fund, Institutional	BlackRock, Inc.	155
Global Natural Resources Funds	3 Years	Calvert Global Water Fund, Y	Calvert Investment Management, Inc.	105
Mixed-Asset Target 2010 Funds	3 Years	American Funds 2010 Target Date Retirement Fund, R-6	American Funds	121
Mixed-Asset Target 2020 Funds	3 Years	American Funds 2020 Target Date Retirement Fund, R-6	American Funds	165



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LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Mixed-Asset Target 2025 Funds	3 Years	American Funds 2025 Target Date Retirement Fund, R-6	American Funds	111
Mixed-Asset Target 2030 Funds	3 Years	American Funds 2030 Target Date Retirement Fund, R-6	American Funds	162
Mixed-Asset Target 2035 Funds	3 Years	American Funds 2035 Target Date Retirement Fund, R-6	American Funds	111
Mixed-Asset Target 2040 Funds	3 Years	American Funds 2040 Target Date Retirement Fund, R-6	American Funds	159
Mixed-Asset Target 2045 Funds	3 Years	American Funds 2045 Target Date Retirement Fund, R-6	American Funds	110
Mixed-Asset Target 2050 Funds	3 Years	American Funds 2050 Target Date Retirement Fund, R-6	American Funds	136
Mixed-Asset Target 2055+ Funds	3 Years	American Funds 2055 Target Date Retirement Fund, R-6	American Funds	43
Global Multi-Cap Core Funds	3 Years	Causeway Global Value Fund, Institutional	Causeway Capital Management, LLC	111
Short-Intermediate Investment-Grade Debt Funds	3 Years	Cavanal Hill Intermediate Bond Fund, Institutional	Cavanal Hill Funds	109
Global Flexible Portfolio Funds	3 Years	Columbia Marsico Flexible Capital Fund, I	Columbia Funds	255
Corporate Debt BBB-Rated Funds	3 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	153
European Region Funds	3 Years	DFA United Kingdom Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	79
Large-Cap Value Funds	3 Years	Dodge & Cox Stock Fund	Dodge & Cox	404
Maryland Municipal Debt Funds	3 Years	Eaton Vance Maryland Municipal Income Fund, I	Eaton Vance Management	29
Massachusetts Municipal Debt Funds	3 Years	Eaton Vance Massachusetts Municipal Income Fund, I	Eaton Vance Management	39
New Jersey Municipal Debt Funds	3 Years	Eaton Vance New Jersey Municipal Income Fund, I	Eaton Vance Management	46
New York Municipal Debt Funds	3 Years	Eaton Vance New York Municipal Income Fund, I	Eaton Vance Management	88
Mid-Cap Growth Funds	3 Years	Eventide Gilead Fund, I	Eventide Asset Management, LLC	336
Flexible Income Funds	3 Years	Fairholme Focused Income Fund	Fairholme Capital Management, LLC	37
Mixed-Asset Target Allocation Conservative Funds	3 Years	Federated Capital Income Fund, F	Federated Investors	295
Health/Biotechnology Funds	3 Years	Fidelity Advisor Biotechnology Fund, Institutional	Fidelity Management & Research Company	60
Retirement Income Funds	3 Years	Fidelity Advisor Income Replacement 2042 Fund, Institutional	Fidelity Management & Research Company	102
International Real Estate Funds	3 Years	Fidelity Advisor International Real Estate Fund, Institutional	Fidelity Management & Research Company	38
Pacific Region Funds	3 Years	Fidelity Pacific Basin Fund	Fidelity Management & Research Company	37
Financial Services Funds	3 Years	Fidelity Select Consumer Finance Portfolio	Fidelity Management & Research Company	54
Industrials Funds	3 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	24
General U.S. Treasury Funds	3 Years	Fidelity Spartan Long-Term Treasury Bond Index Fund, Fidelity Advantage	Fidelity Management & Research Company	23
Precious Metals Equity Funds	3 Years	First Eagle Gold Fund, I	First Eagle Funds	63
Mid-Cap Core Funds	3 Years	First Investors Opportunity Fund, A	First Investors Management Company, Inc.	309
Global Large-Cap Growth Funds	3 Years	GAMCO Global Growth Fund, I	Gabelli Funds, LLC	70
Alternative Equity Market Neutral Funds	3 Years	Gateway Fund, Y	Gateway Investment Advisers, LLC	60
Absolute Return Funds	3 Years	Glenmede Long/Short Portfolio	Glenmede Investment Management, LP	90
Multi-Cap Core Funds	3 Years	Formula Investing US Value Select Fund, A	Gotham Asset Management, LLC	680
Emerging Markets Hard Currency Debt Funds	3 Years	GMO Emerging Country Debt Fund, IV	Grantham, Mayo, Van Otterloo & Co, LLC	77
International Small/Mid-Cap Core Funds	3 Years	GMO International Small Companies Fund, III	Grantham, Mayo, Van Otterloo & Co, LLC	43
Alternative Long/Short Equity Funds	3 Years	Guggenheim Alpha Opportunity Series, Institutional	Guggenheim Investments	103
Multi-Cap Value Funds	3 Years	Rydex S&P 500 Pure Value Fund, H	Guggenheim Investments	250
Corporate Debt A-Rated Funds	3 Years	GuideStone Extended-Duration Bond Fund, GS2	GuideStone Funds	57

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Utility Funds	3 Years	Hennessy Gas Utility Index Fund, Investor	Hennessy Management Company, LP	50
Loan Participation Funds	3 Years	Highland Floating Rate Opportunities Fund, Z	Highland Capital Management Fund Advisors, LP	111
Mid-Cap Value Funds	3 Years	Hotchkis & Wiley Mid-Cap Value Fund, I	Hotchkis & Wiley Capital Management, LLC	174
Equity Income Funds	3 Years	Huber Capital Equity Income Fund, Investor	Huber Capital Management, LLC	283
GNMA Funds	3 Years	ING GNMA Income Fund, I	ING Investments, LLC	62
Core Bond Funds	3 Years	ING Intermediate Bond Fund, W	ING Investments, LLC	437
Global Health/Biotechnology Funds	3 Years	Janus Global Life Sciences Fund, I	Janus Capital Management, LLC	39
Global Small-/Mid-Cap Funds	3 Years	Kinetics Small Cap Opportunities Fund, Institutional	Kinetics Asset Management, LLC	88
Small-Cap Growth Funds	3 Years	Buffalo Emerging Opportunities Fund	Buffalo Mutual Funds	435
International Multi-Cap Value Funds	3 Years	ClearBridge International Value Fund, IS	Legg Mason	97
Short-Intermediate U.S. Government Funds	3 Years	Loomis Sayles Limited Term Government & Agency Fund, Y	Loomis, Sayles & Company, LP	29
Short Investment-Grade Debt Funds	3 Years	Lord Abbett Short Duration Income Fund, I	Lord, Abbett & Co, LLC	233
International Large-Cap Core Funds	3 Years	MassMutual Select Overseas Fund, Z	MassMutual Retirement Services	135
China Region Funds	3 Years	Matthews China Dividend Fund, Institutional	Matthews International Capital Management, LLC	54
Pacific Ex-Japan Funds	3 Years	Matthews Korea Fund, Institutional	Matthews International Capital Management, LLC	65
Global Large-Cap Core Funds	3 Years	MFS Global Equity Fund, I	MFS Investment Management	53
Global Income Funds	3 Years	Morgan Stanley Global Fixed Income Opportunities Fund, I	Morgan Stanley Investment Management, Inc.	145
General U.S. Government Funds	3 Years	Morgan Stanley US Government Securities Trust, I	Morgan Stanley Investment Management, Inc.	110
Alternative Credit Focus Funds	3 Years	MainStay Unconstrained Bond Fund, I	New York Life Investment Management, LLC	54
Emerging Markets Funds	3 Years	Nile Pan Africa Fund, Institutional	Nile Capital Management, LLC	335
California Municipal Debt Funds	3 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	110
High Yield Municipal Debt Funds	3 Years	Nuveen High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	114
Ohio Municipal Debt Funds	3 Years	Nuveen Ohio Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	32
International Small/Mid-Cap Growth Funds	3 Years	Oberweis International Opportunities Fund	Oberweis Asset Management, Inc.	130
Core Plus Bond Funds	3 Years	Oppenheimer Corporate Bond Fund, Y	OppenheimerFunds, Inc.	143
Short U.S. Government Funds	3 Years	Oppenheimer Limited-Term Government Fund, Y	OppenheimerFunds, Inc.	70
General & Insured Municipal Debt Funds	3 Years	Oppenheimer Rochester AMT-Free Municipal Fund, Y	OppenheimerFunds, Inc.	224
Minnesota Municipal Debt Funds	3 Years	Oppenheimer Rochester Minnesota Municipal Fund, A	OppenheimerFunds, Inc.	39
Small-Cap Core Funds	3 Years	Pacific Advisors Small Cap Value Fund, I	Pacific Global Investment Management Company	617
Commodities General Funds	3 Years	PIMCO CommoditiesPLUS Strategy Fund, Institutional	PIMCO	72
International Income Funds	3 Years	PIMCO Foreign Bond Fund (US Dollar-Hedged), Institutional	PIMCO	87
Multi-Sector Income Funds	3 Years	PIMCO Income Fund, Institutional	PIMCO	153
General Bond Funds	3 Years	PIMCO Long-Term Credit Fund, Institutional	PIMCO	33
Global Multi-Cap Value Funds	3 Years	Polaris Global Value Fund	Polaris Capital Management, LLC	60
Dedicated Short-Bias Funds	3 Years	ProFunds Short Precious Metals ProFund, Investor	ProFund Advisors, LLC	69
Flexible Portfolio Funds	3 Years	Putnam Capital Spectrum Fund, Y	Putnam Investment Management, LLC	115
International Large-Cap Value Funds	3 Years	Putnam International Value Fund, Y	Putnam Investment Management, LLC	78
Short Municipal Debt Funds	3 Years	RidgeWorth Short-Term Municipal Bond Fund, I	RidgeWorth Funds	81
Large-Cap Core Funds	3 Years	Smead Value Fund, Institutional	Smead Capital Management, Inc.	802

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Mixed-Asset Target Allocation Growth Funds	3 Years	Villere Balanced Fund	St. Denis J. Villere & Company, LLC	505
Mixed-Asset Target 2015 Funds	3 Years	T. Rowe Price Retirement 2015 Fund	T. Rowe Price Associates, Inc.	118
U.S. Mortgage Funds	3 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	107
Global Large-Cap Value Funds	3 Years	Templeton World Fund, Advisor	Franklin Templeton Investments	33
Global Real Estate Funds	3 Years	Third Avenue Real Estate Value Fund, Institutional	Third Avenue Management, LLC	92
Multi-Cap Growth Funds	3 Years	Thornburg Core Growth Fund, R5	Thornburg Investment Management, Inc.	432
International Multi-Cap Growth Funds	3 Years	Thornburg International Growth Fund, Institutional	Thornburg Investment Management, Inc.	312
New York Intermediate Municipal Debt Funds	3 Years	Thornburg New York Intermediate Municipal Fund, I	Thornburg Investment Management, Inc.	31
Large-Cap Growth Funds	3 Years	Touchstone Sands Capital Institutional Growth Fund	Touchstone Advisors, Inc.	586
Virginia Municipal Debt Funds	3 Years	USAA Virginia Bond Fund, Fund	USAA Investment Management Company	32
California Intermediate Municipal Debt Funds	3 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	37
Intermediate U.S. Government Funds	3 Years	Vanguard Intermediate-Term Government Bond Index Fund, Institutional	Vanguard Group, Inc.	53
Natural Resources Funds	3 Years	Integrity Williston Basin/Mid-North America Stock Fund, A	Viking Fund Management, LLC	44
High Yield Funds	3 Years	Waddell & Reed Advisors High Income Fund, Y	Waddell & Reed Investment Management Company	451
Science & Technology Funds	3 Years	Waddell & Reed Advisors Science & Technology Fund, Y	Waddell & Reed Investment Management Company	130
Global Multi-Cap Growth Funds	3 Years	Wasatch World Innovators Fund, Investor	Wasatch Advisors, Inc.	163
Mixed-Asset Target Allocation Moderate Funds	3 Years	Wells Fargo Advantage Index Asset Allocation Fund, Administrator	Wells Fargo Funds Management, LLC	448
Pennsylvania Municipal Debt Funds	3 Years	Wells Fargo Advantage Pennsylvania Tax-Free Fund, Institutional	Wells Fargo Funds Management, LLC	57
Short-Intermediate Municipal Debt Funds	3 Years	Wells Fargo Advantage Strategic Municipal Bond Fund, Administrator	Wells Fargo Funds Management, LLC	33
Inflation-Protected Bond Funds	5 Years	Allianz Fixed Income Shares Series R	PIMCO	124
Global Small-/Mid-Cap Funds	5 Years	AllianzGI Global Small-Cap Fund, Institutional	Allianz Global Investors	82
Financial Services Funds	5 Years	Alpine Financial Services Fund, Institutional	Alpine Woods Capital Investors, LLC	51
Real Estate Funds	5 Years	Alpine Realty Income & Growth Fund, Institutional	Alpine Woods Capital Investors, LLC	167
International Large-Cap Growth Funds	5 Years	Artisan International Fund, Institutional	Artisan Partners, LP	114
Mid-Cap Core Funds	5 Years	ASTON/Fairpointe Mid Cap Fund, I	Aston Asset Management, LP	267
Intermediate Municipal Debt Funds	5 Years	BlackRock Intermediate Municipal Fund, Institutional	BlackRock, Inc.	126
General Bond Funds	5 Years	Brandes Separately Managed Account Reserve Trust	Brandes Investment Partners, LP	15
Flexible Portfolio Funds	5 Years	Bruce Fund	Bruce and Company, Inc.	81
Global Multi-Cap Core Funds	5 Years	Causeway Global Value Fund, Institutional	Causeway Capital Management, LLC	92
Short-Intermediate Investment-Grade Debt Funds	5 Years	Cavanal Hill Intermediate Bond Fund, Institutional	Cavanal Hill Funds	98
Corporate Debt BBB-Rated Funds	5 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	136
Intermediate U.S. Government Funds	5 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors, LP	45
European Region Funds	5 Years	DFA United Kingdom Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	69
International Large-Cap Core Funds	5 Years	Dodge & Cox International Stock Fund	Dodge & Cox	119
Global Equity Income Funds	5 Years	Dreyfus Global Equity Income Fund, I	Dreyfus Corporation	46
Loan Participation Funds	5 Years	Eaton Vance Floating-Rate Advantage Fund, I	Eaton Vance Management	92
Maryland Municipal Debt Funds	5 Years	Eaton Vance Maryland Municipal Income Fund, I	Eaton Vance Management	27
New York Municipal Debt Funds	5 Years	Eaton Vance New York Municipal Income Fund, I	Eaton Vance Management	78

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International Real Estate Funds	5 Years	ELL International Property Fund, Institutional	ELL Realty Securities, Inc.	36
China Region Funds	5 Years	Fidelity Advisor China Region Fund, Institutional	Fidelity Management & Research Company	44
High Yield Funds	5 Years	Fidelity Advisor High Income Advantage Fund, Institutional	Fidelity Management & Research Company	388
Retirement Income Funds	5 Years	Fidelity Advisor Income Replacement 2042 Fund, Institutional	Fidelity Management & Research Company	92
Convertible Securities Funds	5 Years	Fidelity Convertible Securities Fund	Fidelity Management & Research Company	48
Pacific Region Funds	5 Years	Fidelity Pacific Basin Fund	Fidelity Management & Research Company	31
Science & Technology Funds	5 Years	Fidelity Select IT Services Portfolio	Fidelity Management & Research Company	119
California Intermediate Municipal Debt Funds	5 Years	Franklin California Intermediate-Term Tax-Free Income Fund, Advisor	Franklin Templeton Investments	32
New York Intermediate Municipal Debt Funds	5 Years	Franklin New York Intermediate-Term Tax-Free Income Fund, A	Franklin Templeton Investments	28
Global Large-Cap Growth Funds	5 Years	GAMCO Global Growth Fund, I	Gabelli Funds, LLC	69
International Small/Mid-Cap Core Funds	5 Years	Goldman Sachs International Small Cap Insights Fund, Institutional	Goldman Sachs & Co/GSAM	38
Emerging Markets Hard Currency Debt Funds	5 Years	GMO Emerging Country Debt Fund, IV	Grantham, Mayo, Van Otterloo & Co, LLC	58
Alternative Long/Short Equity Funds	5 Years	Guggenheim Alpha Opportunity Series, Institutional	Guggenheim Investments	62
Corporate Debt A-Rated Funds	5 Years	GuideStone Extended-Duration Bond Fund, GS2	GuideStone Funds	51
Global Natural Resources Funds	5 Years	Guinness Atkinson Global Energy Fund	Guinness Atkinson Asset Management, Inc.	81
Utility Funds	5 Years	Hennessy Gas Utility Index Fund, Investor	Hennessy Management Company, LP	47
Large-Cap Value Funds	5 Years	Hotchkis & Wiley Large Cap Value Fund, I	Hotchkis & Wiley Capital Management, LLC	354
Mid-Cap Value Funds	5 Years	Hotchkis & Wiley Mid-Cap Value Fund, I	Hotchkis & Wiley Capital Management, LLC	152
Equity Income Funds	5 Years	Huber Capital Equity Income Fund, Investor	Huber Capital Management, LLC	252
Small-Cap Value Funds	5 Years	Huber Capital Small Cap Value Fund, Investor	Huber Capital Management, LLC	188
Pacific Ex-Japan Funds	5 Years	Invesco Asia Pacific Growth Fund, Y	Invesco Funds	30
Global Health/Biotechnology Funds	5 Years	Janus Global Life Sciences Fund, D	Janus Capital Management, LLC	34
Mixed-Asset Target 2010 Funds	5 Years	John Hancock Retirement Living through 2010 Portfolio, R5	John Hancock Group	109
International Large-Cap Value Funds	5 Years	JPMorgan International Value Fund, Institutional	J.P. Morgan Funds	68
Multi-Cap Core Funds	5 Years	Kirr Marbach Partners Value Fund	Kirr, Marbach & Company, LLC	581
Small-Cap Growth Funds	5 Years	Buffalo Emerging Opportunities Fund	Buffalo Mutual Funds	390
Mixed-Asset Target Today Funds	5 Years	Legg Mason Target Retirement Fund, I	Legg Mason	103
Core Bond Funds	5 Years	Western Asset Core Bond Fund, IS	Legg Mason	379
Short-Intermediate U.S. Government Funds	5 Years	Loomis Sayles Limited Term Government & Agency Fund, Y	Loomis, Sayles & Company, LP	27
Multi-Sector Income Funds	5 Years	Lord Abbett Bond-Debenture Fund, I	Lord, Abbett & Co, LLC	128
Global Flexible Portfolio Funds	5 Years	Marsico Flexible Capital Fund	Marsico Capital Management, LLC	166
Short Investment-Grade Debt Funds	5 Years	Metropolitan West Low Duration Bond Fund, I	Metropolitan West Asset Management, LLC	195
Absolute Return Funds	5 Years	Metropolitan West Strategic Income Fund, I	Metropolitan West Asset Management, LLC	36
Mixed-Asset Target Allocation Conservative Funds	5 Years	MFS Diversified Income Fund, R4	MFS Investment Management	271
Global Large-Cap Core Funds	5 Years	MFS Global Equity Fund, I	MFS Investment Management	45
Global Income Funds	5 Years	Morgan Stanley Global Fixed Income Opportunities Fund, I	Morgan Stanley Investment Management, Inc.	112
Alternative Credit Focus Funds	5 Years	MainStay Unconstrained Bond Fund, I	New York Life Investment Management, LLC	38
California Municipal Debt Funds	5 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	105
High Yield Municipal Debt Funds	5 Years	Nuveen High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	91

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Virginia Municipal Debt Funds	5 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	30
International Small/Mid-Cap Growth Funds	5 Years	Oberweis International Opportunities Fund	Oberweis Asset Management, Inc.	101
Multi-Cap Value Funds	5 Years	Oceanstone Fund	Oceanstone Capital Management, Inc.	225
Short U.S. Government Funds	5 Years	Oppenheimer Limited-Term Government Fund, Y	OppenheimerFunds, Inc.	63
Short-Intermediate Municipal Debt Funds	5 Years	Oppenheimer Rochester Limited Term Municipal Fund, A	OppenheimerFunds, Inc.	30
Massachusetts Municipal Debt Funds	5 Years	Oppenheimer Rochester Massachusetts Municipal Fund, A	OppenheimerFunds, Inc.	38
Minnesota Municipal Debt Funds	5 Years	Oppenheimer Rochester Minnesota Municipal Fund, A	OppenheimerFunds, Inc.	36
New Jersey Municipal Debt Funds	5 Years	Oppenheimer Rochester New Jersey Municipal Fund, A	OppenheimerFunds, Inc.	44
Ohio Municipal Debt Funds	5 Years	Oppenheimer Rochester Ohio Municipal Fund, A	OppenheimerFunds, Inc.	31
Pennsylvania Municipal Debt Funds	5 Years	Oppenheimer Rochester Pennsylvania Municipal Fund, A	OppenheimerFunds, Inc.	54
International Multi-Cap Core Funds	5 Years	Pear Tree Polaris Foreign Value Fund, Institutional	Pear Tree Advisors, Inc.	275
International Income Funds	5 Years	PIMCO Foreign Bond Fund (US Dollar-Hedged), Institutional	PIMCO	71
Alternative Equity Market Neutral Funds	5 Years	PIMCO Fundamental Advantage Absolute Return Strategy Fund, Institutional	PIMCO	41
GNMA Funds	5 Years	PIMCO GNMA Fund, Institutional	PIMCO	57
Large-Cap Core Funds	5 Years	PIMCO StocksPLUS Absolute Return Fund, Institutional	PIMCO	741
Dedicated Short-Bias Funds	5 Years	PIMCO StocksPLUS AR Short Strategy Fund, Institutional	PIMCO	65
Global Multi-Cap Value Funds	5 Years	Polaris Global Value Fund	Polaris Capital Management, LLC	47
Mid-Cap Growth Funds	5 Years	PRIMECAP Odyssey Aggressive Growth Fund	PRIMECAP Management Company	291
Global Real Estate Funds	5 Years	Principal Global Real Estate Securities Fund, Institutional	Principal Management Corporation	78
General U.S. Government Funds	5 Years	Putnam American Government Income Fund, Y	Putnam Investment Management, LLC	102
Mixed-Asset Target Allocation Moderate Funds	5 Years	Putnam Dynamic Asset Allocation Balanced Fund, Y	Putnam Investment Management, LLC	395
International Multi-Cap Value Funds	5 Years	Schroder International Multi-Cap Value Fund, Investor	Schroder Investment Management North America, Inc.	79
Small-Cap Core Funds	5 Years	SouthernSun Small Cap Fund, Investor	SouthernSun Asset Management, LLC	567
Mixed-Asset Target Allocation Growth Funds	5 Years	Villere Balanced Fund	St. Denis J. Villere & Company, LLC	467
Health/Biotechnology Funds	5 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	55
Mixed-Asset Target 2015 Funds	5 Years	T. Rowe Price Retirement 2015 Fund	T. Rowe Price Associates, Inc.	87
Mixed-Asset Target 2020 Funds	5 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	140
Mixed-Asset Target 2025 Funds	5 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates, Inc.	82
Mixed-Asset Target 2030 Funds	5 Years	T. Rowe Price Retirement 2030 Fund	T. Rowe Price Associates, Inc.	137
Mixed-Asset Target 2035 Funds	5 Years	T. Rowe Price Retirement 2035 Fund	T. Rowe Price Associates, Inc.	82
Mixed-Asset Target 2040 Funds	5 Years	T. Rowe Price Retirement 2040 Fund	T. Rowe Price Associates, Inc.	134
Mixed-Asset Target 2045 Funds	5 Years	T. Rowe Price Retirement 2045 Fund	T. Rowe Price Associates, Inc.	80
Mixed-Asset Target 2050 Funds	5 Years	T. Rowe Price Retirement 2050 Fund	T. Rowe Price Associates, Inc.	104
U.S. Mortgage Funds	5 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	78
International Multi-Cap Growth Funds	5 Years	Thornburg International Growth Fund, Institutional	Thornburg Investment Management, Inc.	276
Precious Metals Equity Funds	5 Years	Tocqueville Gold Fund	Tocqueville Asset Management, LP	54
Large-Cap Growth Funds	5 Years	Touchstone Sands Capital Institutional Growth Fund	Touchstone Advisors, Inc.	525
Core Plus Bond Funds	5 Years	USAA Intermediate-Term Bond Fund, Institutional	USAA Investment Management Company	117

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General U.S. Treasury Funds	5 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	21
Natural Resources Funds	5 Years	Integrity Williston Basin/Mid-North America Stock Fund, A	Viking Fund Management, LLC	42
Emerging Markets Funds	5 Years	Wasatch Emerging Markets Small Cap Fund, Investor	Wasatch Advisors, Inc.	266
Global Multi-Cap Growth Funds	5 Years	Wasatch World Innovators Fund, Investor	Wasatch Advisors, Inc.	112
General & Insured Municipal Debt Funds	5 Years	Wells Fargo Advantage CoreBuilder Shares - Series M	Wells Fargo Funds Management, LLC	202
Multi-Cap Growth Funds	5 Years	Wells Fargo Advantage Growth Fund, Institutional	Wells Fargo Funds Management, LLC	379
Short Municipal Debt Funds	5 Years	Wells Fargo Advantage Short-Term Municipal Bond Fund, Institutional	Wells Fargo Funds Management, LLC	63
Global Income Funds	10 Years	AllianceBernstein Global Bond Fund, A	AllianceBernstein, LP	76
High Yield Funds	10 Years	AllianceBernstein High Income Fund, A	AllianceBernstein, LP	266
Massachusetts Municipal Debt Funds	10 Years	AllianceBernstein Massachusetts Portfolio, A	AllianceBernstein, LP	31
Convertible Securities Funds	10 Years	AllianzGI Convertible Fund, Institutional	Allianz Global Investors	36
International Small/Mid-Cap Growth Funds	10 Years	Artisan International Small Cap Fund, Investor	Artisan Partners, LP	66
International Multi-Cap Growth Funds	10 Years	BlackRock International Opportunities Portfolio, Institutional	BlackRock, Inc.	123
New Jersey Municipal Debt Funds	10 Years	BlackRock New Jersey Municipal Bond Fund, Institutional	BlackRock, Inc.	33
New York Intermediate Municipal Debt Funds	10 Years	BNY Mellon New York Intermediate Tax-Exempt Bond Fund, M	BNY Mellon Fund Advisers	27
Global Large-Cap Growth Funds	10 Years	American Funds New Perspective Fund, R-5	American Funds	40
Global Small-/Mid-Cap Funds	10 Years	American Funds SMALLCAP World Fund, R-5	American Funds	56
Large-Cap Growth Funds	10 Years	Laudus US Large Cap Growth Fund	Charles Schwab Investment Management, Inc.	360
California Intermediate Municipal Debt Funds	10 Years	Schwab California Tax-Free Bond Fund	Charles Schwab Investment Management, Inc.	29
Large-Cap Value Funds	10 Years	Columbia Select Large-Cap Value Fund, R5	Columbia Funds	230
Corporate Debt BBB-Rated Funds	10 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	93
Minnesota Municipal Debt Funds	10 Years	Delaware Minnesota High-Yield Municipal Bond Fund, A	Delaware Management Company	29
New York Municipal Debt Funds	10 Years	Delaware Tax-Free New York Fund, A	Delaware Management Company	72
Intermediate U.S. Government Funds	10 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors, LP	41
International Multi-Cap Value Funds	10 Years	DFA International Value Portfolio III, Institutional	Dimensional Fund Advisors, LP	45
Emerging Markets Funds	10 Years	Driehaus Emerging Markets Growth Fund	Driehaus Capital Management, LLC	133
Short-Intermediate U.S. Government Funds	10 Years	Fidelity Intermediate Government Income Fund	Fidelity Management & Research Company	26
Pacific Region Funds	10 Years	Fidelity Pacific Basin Fund	Fidelity Management & Research Company	20
Natural Resources Funds	10 Years	Fidelity Select Energy Portfolio	Fidelity Management & Research Company	25
Science & Technology Funds	10 Years	Fidelity Select Software and Computer Services Portfolio	Fidelity Management & Research Company	99
Global Multi-Cap Growth Funds	10 Years	Fidelity Worldwide Fund	Fidelity Management & Research Company	44
Flexible Portfolio Funds	10 Years	FPA Crescent Fund	First Pacific Advisors, LLC	39
International Income Funds	10 Years	Templeton Global Bond Fund, Advisor	Franklin Templeton Investments	40
Small-Cap Value Funds	10 Years	Franklin Small Cap Value Fund, Advisor	Franklin Templeton Investments	115
Emerging Markets Hard Currency Debt Funds	10 Years	Goldman Sachs Emerging Markets Debt Fund, Institutional	Goldman Sachs & Co/GSAM	36
International Small/Mid-Cap Core Funds	10 Years	GMO Foreign Small Companies Fund, III	Grantham, Mayo, Van Otterloo & Co, LLC	23
International Large-Cap Growth Funds	10 Years	Harbor International Fund, Institutional	Harbor Capital Advisors, Inc.	80
Global Multi-Cap Core Funds	10 Years	Oakmark Global Fund, I	Oakmark Family of Funds	45



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Mid-Cap Core Funds	10 Years	HSBC Opportunity Fund, I	HSBC Global Asset Management (USA), Inc.	183
Pacific Ex-Japan Funds	10 Years	Invesco Asia Pacific Growth Fund, A	Invesco Funds	23
European Region Funds	10 Years	Invesco European Small Company Fund, A	Invesco Funds	58
International Large-Cap Core Funds	10 Years	Ivy International Core Equity Fund, Y	Ivy Investment Management Company	82
High Yield Municipal Debt Funds	10 Years	Ivy Municipal High Income Fund, I	Ivy Investment Management Company	65
Global Health/Biotechnology Funds	10 Years	Janus Global Life Sciences Fund, D	Janus Capital Management, LLC	27
Multi-Cap Core Funds	10 Years	John Hancock Disciplined Value Mid Cap Fund, Institutional	John Hancock Group	332
General U.S. Government Funds	10 Years	JPMorgan Government Bond Fund, Select	J.P. Morgan Funds	82
International Large-Cap Value Funds	10 Years	JPMorgan International Value Fund, Institutional	J.P. Morgan Funds	32
Small-Cap Core Funds	10 Years	JPMorgan Small Cap Equity Fund, Select	J.P. Morgan Funds	346
Mixed-Asset Target Allocation Conservative Funds	10 Years	Berwyn Income Fund	Killen Group, Inc.	114
Mixed-Asset Target Allocation Moderate Funds	10 Years	Buffalo Flexible Income Fund	Buffalo Mutual Funds	242
Dedicated Short-Bias Funds	10 Years	Leuthold Grizzly Short Fund	Leuthold Weeden Capital Management, LLC	23
Small-Cap Growth Funds	10 Years	Lord Abbett Developing Growth Fund, I	Lord, Abbett & Co, LLC	259
Short Investment-Grade Debt Funds	10 Years	Lord Abbett Short Duration Income Fund, A	Lord, Abbett & Co, LLC	124
Short-Intermediate Investment-Grade Debt Funds	10 Years	Metropolitan West Intermediate Bond Fund, I	Metropolitan West Asset Management, LLC	81
Core Plus Bond Funds	10 Years	Metropolitan West Total Return Bond Fund, I	Metropolitan West Asset Management, LLC	66
Global Large-Cap Core Funds	10 Years	MFS Global Equity Fund, I	MFS Investment Management	31
International Multi-Cap Core Funds	10 Years	MFS International Value Fund, I	MFS Investment Management	107
Utility Funds	10 Years	MFS Utilities Fund, I	MFS Investment Management	38
California Municipal Debt Funds	10 Years	Nuveen California Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	85
Ohio Municipal Debt Funds	10 Years	Nuveen Ohio Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	23
Pennsylvania Municipal Debt Funds	10 Years	Nuveen Pennsylvania Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	45
Real Estate Funds	10 Years	Nuveen Real Estate Securities Fund, I	Nuveen Fund Advisors, Inc.	117
Virginia Municipal Debt Funds	10 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, Inc.	24
Loan Participation Funds	10 Years	Oppenheimer Senior Floating Rate Fund, A	OppenheimerFunds, Inc.	31
Multi-Sector Income Funds	10 Years	PIMCO Diversified Income Fund, Institutional	PIMCO	87
GNMA Funds	10 Years	PIMCO GNMA Fund, Institutional	PIMCO	50
Inflation-Protected Bond Funds	10 Years	PIMCO Real Return Asset Fund, Institutional	PIMCO	37
Large-Cap Core Funds	10 Years	Vanguard PRIMECAP Fund, Admiral	Vanguard Group, Inc.	504
Health/Biotechnology Funds	10 Years	Prudential Jennison Health Sciences Fund, Z	Prudential Investments	48
Global Natural Resources Funds	10 Years	Prudential Jennison Natural Resources Fund, Z	Prudential Investments	33
Intermediate Municipal Debt Funds	10 Years	RidgeWorth Investment Grade Tax-Exempt Bond Fund, I	RidgeWorth Funds	95
Multi-Cap Value Funds	10 Years	RidgeWorth Mid-Cap Value Equity Fund, I	RidgeWorth Funds	146
Alternative Long/Short Equity Funds	10 Years	Robeco Boston Partners Long/Short Equity Fund, Institutional	Robeco Investment Funds	26
Equity Income Funds	10 Years	Amana Income Fund, Investor	Saturna Capital Corporation	139
Mixed-Asset Target Allocation Growth Funds	10 Years	T. Rowe Price Capital Appreciation Fund	T. Rowe Price Associates, Inc.	275
Financial Services Funds	10 Years	T. Rowe Price Financial Services Fund	T. Rowe Price Associates, Inc.	41
Mid-Cap Growth Funds	10 Years	T. Rowe Price Institutional Mid-Cap Equity Growth Fund	T. Rowe Price Associates, Inc.	209



LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	FUND COUNT
Maryland Municipal Debt Funds	10 Years	T. Rowe Price Maryland Tax-Free Bond Fund	T. Rowe Price Associates, Inc.	20
Mixed-Asset Target Today Funds	10 Years	T. Rowe Price Retirement Income Fund	T. Rowe Price Associates, Inc.	31
U.S. Mortgage Funds	10 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	69
Short-Intermediate Municipal Debt Funds	10 Years	Thornburg Limited Term Municipal Fund, Institutional	Thornburg Investment Management, Inc.	29
Mid-Cap Value Funds	10 Years	Transamerica Small/Mid Cap Value, A	Transamerica Funds	85
Core Bond Funds	10 Years	PACE Strategic Fixed Income Investments, Y	UBS Global Asset Management (Americas), Inc.	268
Precious Metals Equity Funds	10 Years	Van Eck International Investors Gold Fund, A	Van Eck Associates Corporation	40
General U.S. Treasury Funds	10 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	15
Short U.S. Government Funds	10 Years	Vanguard Short-Term Federal Fund, Admiral	Vanguard Group, Inc.	56
Global Flexible Portfolio Funds	10 Years	Waddell & Reed Advisors Asset Strategy Fund, Y	Waddell & Reed Investment Management Company	68
Corporate Debt A-Rated Funds	10 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	39
Multi-Cap Growth Funds	10 Years	Wells Fargo Advantage Growth Fund, Institutional	Wells Fargo Funds Management, LLC	247
General & Insured Municipal Debt Funds	10 Years	Wells Fargo Advantage Municipal Bond Fund, Investor	Wells Fargo Funds Management, LLC	159
Short Municipal Debt Funds	10 Years	Wells Fargo Advantage Short-Term Municipal Bond Fund, Investor	Wells Fargo Funds Management, LLC	52

