



2018
THOMSON REUTERS
LIPPER FUND AWARDS

UNITED STATES WINNER LIST

GROUP AWARD	SIZE	COMPANY
Equity	Large Company	Dimensional Fund Advisors, LP
Equity	Small Company	PRIMECAP Management Company
Fixed Income	Large Company	Morgan Stanley Investment Management, Inc.
Fixed Income	Small Company	Ashmore Funds
Mixed Assets	Large Company	TIAA Investments
Mixed Assets	Small Company	Allianz Global Investors
Overall	Large Company	TIAA Investments
Overall	Small Company	Thrivent Mutual Funds

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Absolute Return Funds	3 Years	ATAC Inflation Rotation Fund, Investor	Pension Partners, LLC	57
Alternative Credit Focus Funds	3 Years	Navigator Tactical Fixed Income Fund, I	Clark Capital Management Group, Inc.	52
Alternative Equity Market Neutral Funds	3 Years	AQR Equity Market Neutral Fund, R6	AQR Capital Management, LLC	22
Alternative Event Driven Funds	3 Years	Fidelity Event Driven Opportunities Fund	Fidelity Management & Research Company	17
Alternative Global Macro Funds	3 Years	GMO Special Opportunities Fund, VI	Grantham Mayo Van Otterloo & Company, LLC	70
Alternative Long/Short Equity Funds	3 Years	AQR Long-Short Equity Fund, R6	AQR Capital Management, LLC	76
Alternative Managed Futures Funds	3 Years	361 Global Managed Futures Strategy Fund, I	361 Capital LLC	27
Alternative Multi-Strategy Funds	3 Years	Infinity Q Diversified Alpha Fund, Institutional	Infinity Q Capital Management, LLC	43
California Intermediate Municipal Debt Funds	3 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	17

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
California Municipal Debt Funds	3 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	32
China Region Funds	3 Years	Neuberger Berman Greater China Equity Fund, Institutional	Neuberger Berman Management, LLC	18
Commodities General Funds	3 Years	AQR Risk-Balanced Commodities Strategy Fund, R6	AQR Capital Management, LLC	29
Convertible Securities Funds	3 Years	Franklin Convertible Securities Fund, R6	Franklin Templeton Investments	15
Core Bond Funds	3 Years	Western Asset Core Bond Fund, I	Legg Mason	123
Core Plus Bond Funds	3 Years	Morgan Stanley Institutional Core Plus Fixed Income Portfolio, I	Morgan Stanley Investment Management, Inc.	57
Corporate Debt A-Rated Funds	3 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	15
Corporate Debt BBB-Rated Funds	3 Years	Morgan Stanley Institutional Corporate Bond Portfolio, I	Morgan Stanley Investment Management, Inc.	62
Dedicated Short-Bias Funds	3 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	32
Emerging Markets Funds	3 Years	American Century NT Emerging Markets Fund, G	American Century Investment Management, Inc.	193
Emerging Markets Hard Currency Debt Funds	3 Years	Ashmore Emerging Markets Short Duration Fund, Institutional	Ashmore Funds	66
Emerging Markets Local Currency Debt Funds	3 Years	Eaton Vance Emerging Markets Debt Opportunities Fund, R6	Eaton Vance Management	18
Energy MLP Funds	3 Years	Tortoise MLP & Pipeline Fund, Institutional	Tortoise Capital Advisors, LLC	22
Equity Income Funds	3 Years	Principal Small-MidCap Dividend Income Fund, Institutional	Principal Global Investors, LLC	134
European Region Funds	3 Years	DFA Continental Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	23
Financial Services Funds	3 Years	RMB Mendon Financial Services Fund, A	RMB Capital Management	24
Flexible Income Funds	3 Years	First Trust Preferred Securities and Income Fund, I	First Trust Advisors, LP	16
Flexible Portfolio Funds	3 Years	Kinetics Market Opportunities Fund, Institutional	Kinetics Asset Management, LLC	153
General & Insured Municipal Debt Funds	3 Years	Clearwater Tax-Exempt Bond Fund	Clearwater Management Company, Inc.	76
General Bond Funds	3 Years	PIMCO Long-Term Credit Fund, Institutional	PIMCO	22

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
General U.S. Government Funds	3 Years	Vanguard Long-Term Government Bond Index Fund, Institutional	Vanguard Group, Inc.	22
General U.S. Treasury Funds	3 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	13
Global Equity Income Funds	3 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments	36
Global Income Funds	3 Years	JPMorgan Global Bond Opportunities, R6	J.P. Morgan Funds	44
Global Infrastructure Funds	3 Years	Lazard Global Listed Infrastructure Portfolio, Institutional	Lazard Asset Management, LLC	19
Global Large-Cap Core Funds	3 Years	DFA World Core Equity Portfolio, Institutional	Dimensional Fund Advisors, LP	15
Global Large-Cap Growth Funds	3 Years	Oppenheimer Global Fund, I	OppenheimerFunds, Inc.	22
Global Large-Cap Value Funds	3 Years	Oakmark Global Select Fund, Investor	Oakmark Family of Funds	11
Global Multi-Cap Core Funds	3 Years	QS Global Equity Fund, I	Legg Mason	50
Global Multi-Cap Growth Funds	3 Years	Morgan Stanley Institutional Global Opportunity Portfolio, IS	Morgan Stanley Investment Management, Inc.	56
Global Multi-Cap Value Funds	3 Years	Fidelity Series Intrinsic Opportunistic Fund	Fidelity Management & Research Company	30
Global Natural Resources Funds	3 Years	GMO Resources Fund, IV	Grantham Mayo Van Otterloo & Company, LLC	28
Global Real Estate Funds	3 Years	Saratoga James Alpha Global Real Estate Investments Portfolio, C	Saratoga Capital Management, LLC	40
Global Small-/Mid-Cap Funds	3 Years	Oppenheimer Global Opportunities Fund, I	OppenheimerFunds, Inc.	31
GNMA Funds	3 Years	Voya GNMA Income Fund, I	Voya Investments, LLC	16
Health/Biotechnology Funds	3 Years	Fidelity Select Medical Equipment and Systems Portfolio	Fidelity Management & Research Company	23
High Yield Funds	3 Years	Artisan High Income Fund, Advisor	Artisan Partners, LP	154
High Yield Municipal Debt Funds	3 Years	Dreyfus High Yield Municipal Bond Fund, I	Dreyfus Corporation	40
Industrials Funds	3 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	11
Inflation-Protected Bond Funds	3 Years	Invesco Strategic Real Return Fund, Y	Invesco Funds	52

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Intermediate Municipal Debt Funds	3 Years	BlackRock Strategic Municipal Opportunities Fund, Institutional	BlackRock, Inc.	64
Intermediate U.S. Government Funds	3 Years	American Funds Mortgage Fund, R6	American Funds	15
International Equity Income Funds	3 Years	BNY Mellon International Equity Income Fund, M	Dreyfus Corporation	17
International Income Funds	3 Years	Harvest Asian Bond Fund, Institutional	Harvest Global Investments Limited	27
International Large-Cap Core Funds	3 Years	T. Rowe Price Institutional International Core Equity Fund	T. Rowe Price Associates, Inc.	25
International Large-Cap Growth Funds	3 Years	Vanguard International Growth Fund, Admiral	Vanguard Group, Inc.	41
International Large-Cap Value Funds	3 Years	McKee International Equity Portfolio, Institutional	CS McKee, LP	11
International Multi-Cap Core Funds	3 Years	Goldman Sachs International Equity Insights Fund, Institutional	Goldman Sachs & Company	95
International Multi-Cap Growth Funds	3 Years	Morgan Stanley Institutional International Opportunity Portfolio, IS	Morgan Stanley Investment Management, Inc.	110
International Multi-Cap Value Funds	3 Years	Hartford International Value Fund, Y	Hartford Funds	35
International Real Estate Funds	3 Years	Fidelity Advisor International Real Estate Fund, I	Fidelity Management & Research Company	11
International Small/Mid-Cap Core Funds	3 Years	Fidelity Advisor International Small Cap Fund, I	Fidelity Management & Research Company	22
International Small/Mid-Cap Growth Funds	3 Years	Royce International Premier Fund, Investment	Royce & Associates, LLC	48
Large-Cap Core Funds	3 Years	GMO Quality Fund, VI	Grantham Mayo Van Otterloo & Company, LLC	212
Large-Cap Growth Funds	3 Years	T. Rowe Price Institutional Large-Cap Growth Fund	T. Rowe Price Associates, Inc.	160
Large-Cap Value Funds	3 Years	DoubleLine Shiller Enhanced CAPE, I	DoubleLine Funds	107
Loan Participation Funds	3 Years	Natixis Loomis Sayles Senior Floating Rate & Fixed Income Fund, A	Loomis Sayles & Company, LP	51
Maryland Municipal Debt Funds	3 Years	Nuveen Maryland Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	10
Massachusetts Municipal Debt Funds	3 Years	Nuveen Massachusetts Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mid-Cap Core Funds	3 Years	Tarkio Fund	Front Street Capital Management, Inc.	109

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mid-Cap Growth Funds	3 Years	Janus Henderson Enterprise Fund, N	Janus Henderson Investors	98
Mid-Cap Value Funds	3 Years	Nuance Mid Cap Value Fund, Institutional	Nuance Investments, LLC	42
Minnesota Municipal Debt Funds	3 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mixed-Asset Target 2010 Funds	3 Years	TIAA-CREF Lifecycle 2010 Fund, Institutional	TIAA Investments	24
Mixed-Asset Target 2015 Funds	3 Years	Fidelity Freedom 2015 Fund	Fidelity Management & Research Company	27
Mixed-Asset Target 2020 Funds	3 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	42
Mixed-Asset Target 2025 Funds	3 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates, Inc.	42
Mixed-Asset Target 2030 Funds	3 Years	T. Rowe Price Retirement 2030 Fund	T. Rowe Price Associates, Inc.	43
Mixed-Asset Target 2035 Funds	3 Years	Fidelity Freedom 2035 Fund	Fidelity Management & Research Company	40
Mixed-Asset Target 2040 Funds	3 Years	TIAA-CREF Lifecycle 2040 Fund, Institutional	TIAA Investments	41
Mixed-Asset Target 2045 Funds	3 Years	TIAA-CREF Lifecycle 2045 Fund, Institutional	TIAA Investments	40
Mixed-Asset Target 2050 Funds	3 Years	TIAA-CREF Lifecycle 2050 Fund, Institutional	TIAA Investments	42
Mixed-Asset Target 2055+ Funds	3 Years	TIAA-CREF Lifecycle 2060 Fund, Institutional	TIAA Investments	53
Mixed-Asset Target Allocation Aggressive Growth Funds	3 Years	Goldman Sachs Equity Growth Strategy Portfolio, Institutional	Goldman Sachs & Company	35
Mixed-Asset Target Allocation Conservative Funds	3 Years	Wells Fargo Diversified Income Builder Fund, Institutional	Wells Fargo Funds Management, LLC	77
Mixed-Asset Target Allocation Growth Funds	3 Years	Wells Fargo Diversified Capital Builder Fund, I	Wells Fargo Funds Management, LLC	124
Mixed-Asset Target Allocation Moderate Funds	3 Years	T. Rowe Price Personal Strategy Balanced Fund	T. Rowe Price Associates, Inc.	129
Mixed-Asset Target Today Funds	3 Years	TIAA-CREF Lifecycle Retirement Income Fund, Institutional	TIAA Investments	28
Multi-Cap Core Funds	3 Years	Parnassus Endeavor Fund	Parnassus Investments	211
Multi-Cap Growth Funds	3 Years	Fidelity OTC Portfolio, K	Fidelity Management & Research Company	141

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Multi-Cap Value Funds	3 Years	AllianzGI NFJ Mid-Cap Value Fund, Institutional	Allianz Global Investors	100
Multi-Sector Income Funds	3 Years	Federated Strategic Income Fund, B	Federated Investors	81
Natural Resources Funds	3 Years	ICON Natural Resources Fund, S	Icon Funds	19
New Jersey Municipal Debt Funds	3 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	15
New York Intermediate Municipal Debt Funds	3 Years	BNY Mellon New York Intermediate Tax-Exempt Bond Fund, M	Dreyfus Corporation	13
New York Municipal Debt Funds	3 Years	Oppenheimer Rochester Fund Municipals Fund, Y	OppenheimerFunds, Inc.	26
Ohio Municipal Debt Funds	3 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	13
Pacific Ex-Japan Funds	3 Years	T. Rowe Price Asia Opportunities Fund	T. Rowe Price Associates, Inc.	17
Pacific Region Funds	3 Years	Invesco Pacific Growth Fund, R5	Invesco Funds	10
Pennsylvania Municipal Debt Funds	3 Years	Vanguard Pennsylvania Long-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	18
Precious Metals Equity Funds	3 Years	EuroPac Gold Fund, A	Euro Pacific Asset Management, LLC	20
Real Estate Funds	3 Years	Cohen & Steers Real Estate Securities Fund, Z	Cohen & Steers Capital Management, Inc.	68
Retirement Income Funds	3 Years	Fidelity Managed Retirement 2025 Fund	Fidelity Management & Research Company	18
Science & Technology Funds	3 Years	Fidelity Advisor Semiconductors Fund, I	Fidelity Management & Research Company	38
Short Investment-Grade Debt Funds	3 Years	Morgan Stanley Institutional Short Duration Income Portfolio, I	Morgan Stanley Investment Management, Inc.	82
Short Municipal Debt Funds	3 Years	Oppenheimer Rochester Short Term Municipal Fund, Y	OppenheimerFunds, Inc.	32
Short U.S. Government Funds	3 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	25
Short-Intermediate Investment-Grade Debt Funds	3 Years	Thompson Bond Fund	Thompson IM Funds	43
Short-Intermediate Municipal Debt Funds	3 Years	Eaton Vance Short Duration Municipal Opportunities Fund, I	Eaton Vance Management	21
Short-Intermediate U.S. Government Funds	3 Years	Eaton Vance Government Obligations Fund, I	Eaton Vance Management	10

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Small-Cap Core Funds	3 Years	Federated MDT Small Cap Core Fund, Institutional	Federated Investors	278
Small-Cap Growth Funds	3 Years	Oberweis Micro-Cap Fund, Investor	Oberweis Asset Management, Inc.	148
Small-Cap Value Funds	3 Years	Towle Deep Value Fund	Towle & Company	83
U.S. Mortgage Funds	3 Years	Voya Securitized Credit Fund, P	Voya Investments, LLC	31
Ultra-Short Obligation Funds	3 Years	PIMCO Short-Term Fund, Institutional	PIMCO	40
Utility Funds	3 Years	Vanguard Utilities Index Fund, Admiral	Vanguard Group, Inc.	14
Virginia Municipal Debt Funds	3 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	11
Absolute Return Funds	5 Years	Caval Hill Opportunistic Fund, Institutional	Caval Hill Funds	34
Alternative Credit Focus Funds	5 Years	Guggenheim Macro Opportunities Fund, Institutional	Guggenheim Investments	33
Alternative Equity Market Neutral Funds	5 Years	Gateway Fund, Y	Gateway Investment Advisers, LLC	13
Alternative Event Driven Funds	5 Years	BlackRock Event Driven Equity Fund, Institutional	BlackRock, Inc.	11
Alternative Global Macro Funds	5 Years	KCM Macro Trends Fund, R-1	Kerns Capital Management, Inc.	55
Alternative Long/Short Equity Funds	5 Years	Nuveen Equity Long/Short Fund, I	Nuveen Fund Advisors, LLC	46
Alternative Managed Futures Funds	5 Years	Altegris Futures Evolution Strategy Fund, I	Altegris Advisors, LLC	16
Alternative Multi-Strategy Funds	5 Years	AQR Multi-Strategy Alternative Fund, I	AQR Capital Management, LLC	22
California Intermediate Municipal Debt Funds	5 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	16
California Municipal Debt Funds	5 Years	Nuveen California High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	31
China Region Funds	5 Years	Victory Sophus China Fund, Y	Victory Capital Management, Inc.	17
Commodities General Funds	5 Years	LoCorr Long/Short Commodities Strategy Fund, I	LoCorr Fund Management, LLC	27
Convertible Securities Funds	5 Years	Victory INCORE Investment Grade Convertible Fund, I	Victory Capital Management, Inc.	14

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Core Bond Funds	5 Years	Western Asset Core Bond Fund, IS	Legg Mason	117
Core Plus Bond Funds	5 Years	Morgan Stanley Institutional Core Plus Fixed Income Portfolio, I	Morgan Stanley Investment Management, Inc.	55
Corporate Debt A-Rated Funds	5 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	14
Corporate Debt BBB-Rated Funds	5 Years	Morgan Stanley Institutional Corporate Bond Portfolio, I	Morgan Stanley Investment Management, Inc.	58
Dedicated Short-Bias Funds	5 Years	ProFunds Short Oil & Gas ProFund, Investor	ProFunds Group	31
Emerging Markets Funds	5 Years	City National Rochdale Emerging Markets Fund, N	City National Rochdale, LLC	148
Emerging Markets Hard Currency Debt Funds	5 Years	GMO Emerging Country Debt Fund, IV	Grantham Mayo Van Otterloo & Company, LLC	43
Emerging Markets Local Currency Debt Funds	5 Years	Eaton Vance Emerging Markets Local Income Fund, I	Eaton Vance Management	14
Energy MLP Funds	5 Years	Tortoise MLP & Pipeline Fund, Institutional	Tortoise Capital Advisors, LLC	14
Equity Income Funds	5 Years	Crawford Dividend Opportunity Fund	Crawford Investment Counsel, Inc.	108
European Region Funds	5 Years	DFA Continental Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	21
Financial Services Funds	5 Years	RMB Mendon Financial Services Fund, A	RMB Capital Management	23
Flexible Income Funds	5 Years	Cohen & Steers Preferred Securities & Income Fund, I	Cohen & Steers Capital Management, Inc.	14
Flexible Portfolio Funds	5 Years	Catalyst/Lyons Tactical Allocation Fund, A	Catalyst Funds	120
General & Insured Municipal Debt Funds	5 Years	Clearwater Tax-Exempt Bond Fund	Clearwater Management Company, Inc.	72
General Bond Funds	5 Years	PIMCO Long-Term Credit Fund, Institutional	PIMCO	19
General U.S. Government Funds	5 Years	Vanguard Long-Term Government Bond Index Fund, Institutional	Vanguard Group, Inc.	22
General U.S. Treasury Funds	5 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	12
Global Equity Income Funds	5 Years	Steward Global Equity Income Fund, Institutional	Crossmark Global Investments	31
Global Income Funds	5 Years	JPMorgan Global Bond Opportunities, R6	J.P. Morgan Funds	41

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Global Infrastructure Funds	5 Years	Lazard Global Listed Infrastructure Portfolio, Institutional	Lazard Asset Management, LLC	14
Global Large-Cap Core Funds	5 Years	DFA World Core Equity Portfolio, Institutional	Dimensional Fund Advisors, LP	12
Global Large-Cap Growth Funds	5 Years	Oppenheimer Global Fund, I	OppenheimerFunds, Inc.	20
Global Large-Cap Value Funds	5 Years	Oakmark Global Select Fund, Investor	Oakmark Family of Funds	10
Global Multi-Cap Core Funds	5 Years	USAA Capital Growth Fund	USAA Asset Management Company	42
Global Multi-Cap Growth Funds	5 Years	Morgan Stanley Institutional Global Opportunity Portfolio, I	Morgan Stanley Investment Management, Inc.	51
Global Multi-Cap Value Funds	5 Years	Polaris Global Value Fund	Polaris Capital Management, LLC	22
Global Natural Resources Funds	5 Years	AllianzGI Global Water Fund, Institutional	Allianz Global Investors	27
Global Real Estate Funds	5 Years	Third Avenue Real Estate Value Fund, Institutional	Third Avenue Management, LLC	33
Global Small-/Mid-Cap Funds	5 Years	Oppenheimer Global Opportunities Fund, I	OppenheimerFunds, Inc.	23
GNMA Funds	5 Years	Vanguard GNMA Fund, Admiral	Vanguard Group, Inc.	16
Health/Biotechnology Funds	5 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	22
High Yield Funds	5 Years	Fidelity Capital & Income Fund	Fidelity Management & Research Company	136
High Yield Municipal Debt Funds	5 Years	Nuveen High Yield Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	32
Industrials Funds	5 Years	Fidelity Select Defense and Aerospace Portfolio	Fidelity Management & Research Company	10
Inflation-Protected Bond Funds	5 Years	Janus Henderson Real Return Fund, I	Janus Henderson Investors	45
Intermediate Municipal Debt Funds	5 Years	Transamerica Intermediate Muni, I	Transamerica Asset Management, Inc.	58
Intermediate U.S. Government Funds	5 Years	American Funds Mortgage Fund, R6	American Funds	15
International Equity Income Funds	5 Years	JPMorgan International Equity Income Fund, R5	J.P. Morgan Funds	14
International Income Funds	5 Years	PIMCO Foreign Bond Fund (U.S. Dollar-Hedged), Institutional	PIMCO	23

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Large-Cap Core Funds	5 Years	Ivy International Core Equity Fund, I	Ivy Investment Management Company	24
International Large-Cap Growth Funds	5 Years	Vanguard International Growth Fund, Admiral	Vanguard Group, Inc.	38
International Large-Cap Value Funds	5 Years	Laudus Mondrian International Equity Fund	Charles Schwab Investment Management, Inc.	11
International Multi-Cap Core Funds	5 Years	Goldman Sachs International Equity Insights Fund, Institutional	Goldman Sachs & Company	83
International Multi-Cap Growth Funds	5 Years	Morgan Stanley Institutional International Opportunity Portfolio, I	Morgan Stanley Investment Management, Inc.	106
International Multi-Cap Value Funds	5 Years	Hartford International Value Fund, Y	Hartford Funds	34
International Real Estate Funds	5 Years	Fidelity Advisor International Real Estate Fund, I	Fidelity Management & Research Company	10
International Small/Mid-Cap Core Funds	5 Years	Schwab Fundamental International Small Company Index Fund	Charles Schwab Investment Management, Inc.	19
International Small/Mid-Cap Growth Funds	5 Years	Oppenheimer International Small-Mid Company Fund, I	OppenheimerFunds, Inc.	43
Large-Cap Core Funds	5 Years	Vanguard PRIMECAP Fund, Admiral	PRIMECAP Management Company	197
Large-Cap Growth Funds	5 Years	Edgewood Growth Fund, Institutional	Edgewood Management, LLC	154
Large-Cap Value Funds	5 Years	Dodge & Cox Stock Fund	Dodge & Cox	101
Loan Participation Funds	5 Years	Natixis Loomis Sayles Senior Floating Rate & Fixed Income Fund, A	Loomis Sayles & Company, LP	37
Maryland Municipal Debt Funds	5 Years	T. Rowe Price Maryland Tax-Free Bond Fund	T. Rowe Price Associates, Inc.	10
Massachusetts Municipal Debt Funds	5 Years	Vanguard Massachusetts Tax-Exempt Fund, Investor	Vanguard Group, Inc.	13
Mid-Cap Core Funds	5 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	101
Mid-Cap Growth Funds	5 Years	BlackRock Mid-Cap Growth Equity Portfolio, Institutional	BlackRock, Inc.	94
Mid-Cap Value Funds	5 Years	Vanguard Mid-Cap Value Index Fund, Admiral	Vanguard Group, Inc.	37
Minnesota Municipal Debt Funds	5 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mixed-Asset Target 2010 Funds	5 Years	TIAA-CREF Lifecycle 2010 Fund, Institutional	TIAA Investments	18

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2015 Funds	5 Years	T. Rowe Price Retirement 2015 Fund	T. Rowe Price Associates, Inc.	20
Mixed-Asset Target 2020 Funds	5 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	32
Mixed-Asset Target 2025 Funds	5 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates, Inc.	34
Mixed-Asset Target 2030 Funds	5 Years	American Funds 2030 Target Date Retirement Fund, R6	American Funds	33
Mixed-Asset Target 2035 Funds	5 Years	American Funds 2035 Target Date Retirement Fund, R6	American Funds	32
Mixed-Asset Target 2040 Funds	5 Years	American Funds 2040 Target Date Retirement Fund, R6	American Funds	31
Mixed-Asset Target 2045 Funds	5 Years	American Funds 2045 Target Date Retirement Fund, R6	American Funds	31
Mixed-Asset Target 2050 Funds	5 Years	American Funds 2050 Target Date Retirement Fund, R6	American Funds	31
Mixed-Asset Target 2055+ Funds	5 Years	American Funds 2055 Target Date Retirement Fund, R6	American Funds	25
Mixed-Asset Target Allocation Aggressive Growth Funds	5 Years	Great-West Aggressive Profile Fund, Investor	GW Capital Management, LLC	33
Mixed-Asset Target Allocation Conservative Funds	5 Years	Wells Fargo Diversified Income Builder Fund, Institutional	Wells Fargo Funds Management, LLC	74
Mixed-Asset Target Allocation Growth Funds	5 Years	Wells Fargo Diversified Capital Builder Fund, I	Wells Fargo Funds Management, LLC	119
Mixed-Asset Target Allocation Moderate Funds	5 Years	Wells Fargo Index Asset Allocation Fund, Administrator	Wells Fargo Funds Management, LLC	124
Mixed-Asset Target Today Funds	5 Years	TIAA-CREF Lifecycle Retirement Income Fund, Institutional	TIAA Investments	24
Multi-Cap Core Funds	5 Years	Parnassus Endeavor Fund	Parnassus Investments	200
Multi-Cap Growth Funds	5 Years	Fidelity OTC Portfolio, K	Fidelity Management & Research Company	131
Multi-Cap Value Funds	5 Years	LSV Value Equity Fund, Institutional	LSV Asset Management	93
Multi-Sector Income Funds	5 Years	PIMCO Income Fund, Institutional	PIMCO	61
Natural Resources Funds	5 Years	Fidelity Select Energy Portfolio	Fidelity Management & Research Company	15
New Jersey Municipal Debt Funds	5 Years	Vanguard New Jersey Long-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	15

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
New York Intermediate Municipal Debt Funds	5 Years	Columbia AMT-Free New York Intermediate Muni Bond Fund, I	Columbia Threadneedle Investments	11
New York Municipal Debt Funds	5 Years	MainStay New York Tax Free Opportunities Fund, I	MainStay Funds	26
Ohio Municipal Debt Funds	5 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	13
Pacific Ex-Japan Funds	5 Years	Goldman Sachs Asia Equity Fund, Institutional	Goldman Sachs & Company	14
Pennsylvania Municipal Debt Funds	5 Years	Vanguard Pennsylvania Long-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	18
Precious Metals Equity Funds	5 Years	Gabelli Gold Fund, I	Gabelli Funds, LLC	18
Real Estate Funds	5 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management, Inc.	63
Retirement Income Funds	5 Years	Fidelity Managed Retirement 2025 Fund	Fidelity Management & Research Company	18
Science & Technology Funds	5 Years	Fidelity Select Semiconductors Portfolio	Fidelity Management & Research Company	37
Short Investment-Grade Debt Funds	5 Years	Morgan Stanley Institutional Short Duration Income Portfolio, I	Morgan Stanley Investment Management, Inc.	70
Short Municipal Debt Funds	5 Years	Oppenheimer Rochester Short Term Municipal Fund, Y	OppenheimerFunds, Inc.	29
Short U.S. Government Funds	5 Years	Eaton Vance Short Duration Government Income Fund, I	Eaton Vance Management	25
Short-Intermediate Investment-Grade Debt Funds	5 Years	Transamerica Asset Allocation Short Horizon, R4	Transamerica Asset Management, Inc.	38
Short-Intermediate Municipal Debt Funds	5 Years	Wells Fargo Strategic Municipal Bond Fund, I	Wells Fargo Funds Management, LLC	21
Short-Intermediate U.S. Government Funds	5 Years	Eaton Vance Government Obligations Fund, I	Eaton Vance Management	10
Small-Cap Core Funds	5 Years	Federated MDT Small Cap Core Fund, Institutional	Federated Investors	253
Small-Cap Growth Funds	5 Years	Oberweis Micro-Cap Fund, Investor	Oberweis Asset Management, Inc.	139
Small-Cap Value Funds	5 Years	Nuveen Small Cap Value Fund, I	Nuveen Fund Advisors, LLC	77
U.S. Mortgage Funds	5 Years	Morgan Stanley Mortgage Securities Trust, I	Morgan Stanley Investment Management, Inc.	28
Ultra-Short Obligation Funds	5 Years	PIMCO Short-Term Fund, Institutional	PIMCO	35

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Utility Funds	5 Years	Vanguard Utilities Index Fund, Admiral	Vanguard Group, Inc.	14
Virginia Municipal Debt Funds	5 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	11
Alternative Credit Focus Funds	10 Years	MainStay Unconstrained Bond Fund, I	MainStay Funds	10
Alternative Global Macro Funds	10 Years	RiverNorth Core Opportunity Fund, R	RiverNorth Capital Management, Inc.	19
Alternative Long/Short Equity Funds	10 Years	Boston Partners Long/Short Equity Fund, Institutional	Boston Partners Investment Funds	18
California Intermediate Municipal Debt Funds	10 Years	Vanguard California Intermediate-Term Tax-Exempt Fund, Admiral	Vanguard Group, Inc.	14
California Municipal Debt Funds	10 Years	Franklin California High Yield Municipal Fund, Advisor	Franklin Templeton Investments	30
China Region Funds	10 Years	Fidelity China Region Fund	Fidelity Management & Research Company	13
Convertible Securities Funds	10 Years	Franklin Convertible Securities Fund, A	Franklin Templeton Investments	12
Core Bond Funds	10 Years	Vanguard Intermediate-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	101
Core Plus Bond Funds	10 Years	Natixis Loomis Sayles Core Plus Bond Fund, Y	Loomis Sayles & Company, LP	43
Corporate Debt A-Rated Funds	10 Years	Vanguard Long-Term Investment-Grade Fund, Admiral	Vanguard Group, Inc.	13
Corporate Debt BBB-Rated Funds	10 Years	Delaware Extended Duration Bond Fund, Institutional	Delaware Management Company	47
Dedicated Short-Bias Funds	10 Years	Leuthold Grizzly Short Fund	Leuthold Weeden Capital Management, LLC	29
Emerging Markets Funds	10 Years	Fidelity Advisor Emerging Asia Fund, I	Fidelity Management & Research Company	76
Emerging Markets Hard Currency Debt Funds	10 Years	TCW Emerging Markets Income Fund, I	TCW Investment Management Company	20
Equity Income Funds	10 Years	Parnassus Core Equity Fund, Institutional	Parnassus Investments	78
European Region Funds	10 Years	Invesco European Small Company Fund, A	Invesco Funds	19
Financial Services Funds	10 Years	T. Rowe Price Financial Services Fund	T. Rowe Price Associates, Inc.	23
Flexible Portfolio Funds	10 Years	Marsico Flexible Capital Fund	Marsico Capital Management, LLC	58

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
General & Insured Municipal Debt Funds	10 Years	Nuveen All-American Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	61
General U.S. Government Funds	10 Years	PIMCO Long-Term U.S. Government Fund, Institutional	PIMCO	18
General U.S. Treasury Funds	10 Years	Vanguard Long-Term Treasury Fund, Admiral	Vanguard Group, Inc.	12
Global Equity Income Funds	10 Years	Dreyfus Global Equity Income Fund, I	Dreyfus Corporation	15
Global Income Funds	10 Years	Prudential Global Total Return Fund, Z	Prudential Investments, LLC	27
Global Large-Cap Growth Funds	10 Years	American Funds New Perspective Fund, R5	American Funds	14
Global Multi-Cap Core Funds	10 Years	DFA Global Equity Portfolio, Institutional	Dimensional Fund Advisors, LP	22
Global Multi-Cap Growth Funds	10 Years	Wasatch World Innovators Fund, Investor	Wasatch Advisors, Inc.	27
Global Multi-Cap Value Funds	10 Years	Polaris Global Value Fund	Polaris Capital Management, LLC	13
Global Natural Resources Funds	10 Years	T. Rowe Price New Era Fund	T. Rowe Price Associates, Inc.	20
Global Real Estate Funds	10 Years	Principal Global Real Estate Securities Fund, Institutional	Principal Global Investors, LLC	24
Global Small-/Mid-Cap Funds	10 Years	Oppenheimer Global Opportunities Fund, Y	OppenheimerFunds, Inc.	15
GNMA Funds	10 Years	PIMCO GNMA Fund, Institutional	PIMCO	16
Health/Biotechnology Funds	10 Years	T. Rowe Price Health Sciences Fund	T. Rowe Price Associates, Inc.	21
High Yield Funds	10 Years	Lord Abbett High Yield Fund, I	Lord Abbett & Company, LLC	103
High Yield Municipal Debt Funds	10 Years	Delaware National High-Yield Municipal Bond Fund, A	Delaware Management Company	27
Inflation-Protected Bond Funds	10 Years	PIMCO Fixed Income SHares Series R	Allianz Global Investors	32
Intermediate Municipal Debt Funds	10 Years	BlackRock Strategic Municipal Opportunities Fund, Institutional	BlackRock, Inc.	48
Intermediate U.S. Government Funds	10 Years	DFA Intermediate Government Fixed Income Portfolio, Institutional	Dimensional Fund Advisors, LP	13
International Income Funds	10 Years	PIMCO Foreign Bond Fund (U.S. Dollar-Hedged), Institutional	PIMCO	14

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
International Large-Cap Core Funds	10 Years	Ivy International Core Equity Fund, I	Ivy Investment Management Company	17
International Large-Cap Growth Funds	10 Years	Vanguard International Growth Fund, Admiral	Vanguard Group, Inc.	30
International Multi-Cap Core Funds	10 Years	PIMCO StocksPLUS International Fund (U.S. Dollar-Hedged), Institutional	PIMCO	57
International Multi-Cap Growth Funds	10 Years	Thornburg International Growth Fund, Institutional	Thornburg Investment Management, Inc.	82
International Multi-Cap Value Funds	10 Years	Schwab Fundamental International Large Company Index Fund	Charles Schwab Investment Management, Inc.	29
International Small/Mid-Cap Core Funds	10 Years	DFA International Small Company Portfolio, Institutional	Dimensional Fund Advisors, LP	13
International Small/Mid-Cap Growth Funds	10 Years	Oberweis International Opportunities Fund, Investor	Oberweis Asset Management, Inc.	32
Large-Cap Core Funds	10 Years	Vanguard PRIMECAP Fund, Admiral	PRIMECAP Management Company	168
Large-Cap Growth Funds	10 Years	Shelton NASDAQ-100 Index Fund, Direct	Shelton Capital Management	130
Large-Cap Value Funds	10 Years	Columbia Select Large-Cap Value Fund, I2	Columbia Threadneedle Investments	83
Loan Participation Funds	10 Years	Eaton Vance Floating-Rate & High Income Fund, Institutional	Eaton Vance Management	16
Maryland Municipal Debt Funds	10 Years	Nuveen Maryland Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	10
Massachusetts Municipal Debt Funds	10 Years	Nuveen Massachusetts Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mid-Cap Core Funds	10 Years	Thrivent Mid Cap Stock Fund, S	Thrivent Mutual Funds	80
Mid-Cap Growth Funds	10 Years	T. Rowe Price Institutional Mid-Cap Equity Growth Fund	T. Rowe Price Associates, Inc.	79
Mid-Cap Value Funds	10 Years	Harbor Mid Cap Value Fund, Institutional	Harbor Capital Advisors, Inc.	29
Minnesota Municipal Debt Funds	10 Years	Nuveen Minnesota Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	13
Mixed-Asset Target 2010 Funds	10 Years	T. Rowe Price Retirement 2010 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target 2015 Funds	10 Years	T. Rowe Price Retirement 2015 Fund	T. Rowe Price Associates, Inc.	10
Mixed-Asset Target 2020 Funds	10 Years	T. Rowe Price Retirement 2020 Fund	T. Rowe Price Associates, Inc.	19

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUNT
Mixed-Asset Target 2025 Funds	10 Years	T. Rowe Price Retirement 2025 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target 2030 Funds	10 Years	T. Rowe Price Retirement 2030 Fund	T. Rowe Price Associates, Inc.	19
Mixed-Asset Target 2035 Funds	10 Years	T. Rowe Price Retirement 2035 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target 2040 Funds	10 Years	T. Rowe Price Retirement 2040 Fund	T. Rowe Price Associates, Inc.	19
Mixed-Asset Target 2045 Funds	10 Years	T. Rowe Price Retirement 2045 Fund	T. Rowe Price Associates, Inc.	15
Mixed-Asset Target 2050 Funds	10 Years	T. Rowe Price Retirement 2050 Fund	T. Rowe Price Associates, Inc.	14
Mixed-Asset Target Allocation Aggressive Growth Funds	10 Years	Great-West Aggressive Profile Fund, Investor	GW Capital Management, LLC	29
Mixed-Asset Target Allocation Conservative Funds	10 Years	MFS Diversified Income Fund, I	MFS Investment Management	62
Mixed-Asset Target Allocation Growth Funds	10 Years	T. Rowe Price Capital Appreciation Fund	T. Rowe Price Associates, Inc.	106
Mixed-Asset Target Allocation Moderate Funds	10 Years	Hartford Balanced Income Fund, Y	Hartford Funds	106
Mixed-Asset Target Today Funds	10 Years	American Century One Choice In Retirement Portfolio, I	American Century Investment Management, Inc.	14
Multi-Cap Core Funds	10 Years	Parnassus Endeavor Fund	Parnassus Investments	158
Multi-Cap Growth Funds	10 Years	Fidelity OTC Portfolio	Fidelity Management & Research Company	109
Multi-Cap Value Funds	10 Years	Hotchkis & Wiley Value Opportunities Fund, I	Hotchkis & Wiley Capital Management, LLC	85
Multi-Sector Income Funds	10 Years	PIMCO Income Fund, Institutional	PIMCO	40
Natural Resources Funds	10 Years	Integrity Williston Basin/Mid-North America Stock Fund, A	Viking Fund Management, LLC	15
New Jersey Municipal Debt Funds	10 Years	Nuveen New Jersey Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	15
New York Intermediate Municipal Debt Funds	10 Years	Franklin New York Intermediate-Term Tax-Free Income Fund, A	Franklin Templeton Investments	11
New York Municipal Debt Funds	10 Years	Columbia New York Tax-Exempt Fund, A	Columbia Threadneedle Investments	24
Ohio Municipal Debt Funds	10 Years	Vanguard Ohio Long-Term Tax-Exempt Fund, Investor	Vanguard Group, Inc.	13

US MUTUAL FUND CLASSIFICATION	BEST FUND	FUND NAME	COMPANY	PORTFOLIO COUN
Pennsylvania Municipal Debt Funds	10 Years	Nuveen Pennsylvania Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	18
Precious Metals Equity Funds	10 Years	VanEck International Investors Gold Fund, I	Van Eck Associates Corporation	18
Real Estate Funds	10 Years	Cohen & Steers Real Estate Securities Fund, I	Cohen & Steers Capital Management, Inc.	49
Retirement Income Funds	10 Years	Fidelity Advisor Simplicity RMD 2015 Fund, I	Fidelity Management & Research Company	10
Science & Technology Funds	10 Years	Red Oak Technology Select Fund	Oak Associates, Ltd.	37
Short Investment-Grade Debt Funds	10 Years	Lord Abbett Short Duration Income Fund, I	Lord Abbett & Company, LLC	63
Short Municipal Debt Funds	10 Years	Virtus Seix Short-Term Municipal Bond Fund, I	RidgeWorth Capital Management, Inc.	23
Short U.S. Government Funds	10 Years	Wells Fargo Short Duration Government Bond Fund, I	Wells Fargo Funds Management, LLC	22
Short-Intermediate Investment-Grade Debt Funds	10 Years	Thompson Bond Fund	Thompson IM Funds	31
Short-Intermediate Municipal Debt Funds	10 Years	Thornburg Limited Term Municipal Fund, Institutional	Thornburg Investment Management, Inc.	18
Short-Intermediate U.S. Government Funds	10 Years	Natixis Loomis Sayles Limited Term Government and Agency Fund, Y	Loomis Sayles & Company, LP	10
Small-Cap Core Funds	10 Years	PIMCO StocksPLUS Small Fund, Institutional	PIMCO	202
Small-Cap Growth Funds	10 Years	Brown Capital Management Small Company Fund, Investor	Brown Capital Management, LLC	120
Small-Cap Value Funds	10 Years	Adirondack Small Cap Fund	Adirondack Research & Management, Inc.	55
U.S. Mortgage Funds	10 Years	TCW Total Return Bond Fund, I	TCW Investment Management Company	23
Ultra-Short Obligation Funds	10 Years	PIMCO Short-Term Fund, Institutional	PIMCO	22
Utility Funds	10 Years	Hennessy Gas Utility Fund, Investor	Hennessy Funds	14
Virginia Municipal Debt Funds	10 Years	Nuveen Virginia Municipal Bond Fund, I	Nuveen Fund Advisors, LLC	11

