

 Selected Search Criteria

Basic Info

- Asset Universe: **Mutual Funds, Exchange Traded Funds**
- SubType: **U.S. Equity, Mixed Asset, Global Equity, International Equity**
- Age, years: **20+**
- Index? **No Index Funds**

MFO Designations

- Great Owls? **Only GO Funds**

Purchase Info

- Open or Closed? **Open Only**

Name	Symbol	LipperCategory	APR	MAXDD %	APR vs Peer	Age yr	ER %/yr	AUM \$M	Alarm Rating	APR Rating	MAXDD Rating	STDEV Rating	DSDEV Rating	Bear Rating	Down Rating	Sharpe Rating
American Funds AMCAP A	AMCPX	Multi-Cap Core	8.2	-48.6	1.2	53.5	0.69	72,284	None	4	2	2	2	2	2	5
American Funds Balanced A	ABALX	Mixed-Asset Target Alloc Growth	7.8	-37.0	1.5	45.3	0.59	169,053	None	5	2	1	1	4	4	5
American Funds New World A	NEWFX	Emerging Markets	9.6	-53.0	0.3	21.4	1.03	50,325	None	3	1	1	1	4	4	5
AMG Yacktman Focused N	YAFFX	Large-Cap Value	11.7	-38.4	5.0	23.5	1.29	3,419	HR	5	1	1	1	1	1	5
AMG Yacktman I	YACKX	Large-Cap Value	11.4	-41.0	4.7	28.3	0.75	7,289	HR	5	1	1	1	1	1	5
BNY Mellon Small/Mid Cap Growth I	SDSCX	Mid-Cap Growth	11.6	-47.0	2.7	32.8	0.74	4,213	HR	5	1	3	2	5	5	5
Columbia Dividend Income Inst	GSFTX	Equity Income	8.7	-43.3	1.8	22.7	0.69	26,708	None	5	1	2	2	1	1	5
FAM Dividend Focus Inv	FAMEX	Equity Income	9.6	-49.1	2.8	24.6	1.26	499	HR	5	3	3	2	1	1	5
Fidelity Advisor Emerging Asia A	FEAAX	Emerging Markets	12.4	-57.1	3.2	26.7	1.32	969	HR	5	1	2	1	6	6	5
Fidelity Balanced	FBALX	Mixed-Asset Target Alloc Growth	8.3	-40.4	2.0	34.0	0.52	39,423	HR	5	3	3	2	6	6	5
Fidelity Puritan	FPURX	Mixed-Asset Target Alloc Growth	7.6	-37.9	1.3	60.9	0.52	30,290	HR	5	3	2	2	5	5	5
Franklin DynaTech A	FKDNX	Multi-Cap Growth	10.7	-47.2	2.7	52.8	0.86	20,934	None	5	2	3	2	3	3	5
Invesco Intl Small-Mid Company Fd A	OSMAX	International Small/Mid-Cap Growth	13.2	-72.6	5.7	23.0	1.31	7,890	None	5	5	5	5	9	9	5
Janus Henderson Balanced T	JABAX	Mixed-Asset Target Alloc Moderate	7.5	-21.5	1.8	28.2	0.83	23,732	HR	5	1	2	1	2	2	5
Jensen Quality Growth J	JENSX	Large-Cap Core	8.0	-41.1	1.1	28.3	0.85	9,913	None	5	1	1	1	1	1	5
John Hancock US Global Leaders Growth A	USGLX	Large-Cap Growth	8.3	-42.0	0.5	25.1	1.15	2,218	None	4	1	1	1	1	1	5
JPMorgan Emerging Markets Equity L	JMIEX	Emerging Markets	10.9	-58.2	1.6	27.0	0.94	12,805	HR	4	2	2	2	7	8	5
JPMorgan Investor Growth A	ONGAX	Mixed-Asset Target Alloc Agg Gro	6.7	-45.3	1.0	23.9	0.97	3,428	None	5	1	1	1	10	10	5
LKCM Balanced Inst	LKBAX	Mixed-Asset Target Alloc Growth	7.2	-27.5	0.9	22.8	0.80	122	None	4	1	1	1	4	4	5
LKCM Equity Inst	LKEQX	Multi-Cap Core	7.9	-44.8	0.9	24.8	0.80	436	HR	4	1	1	1	1	1	5
Madison Dividend Income Y	BHBFX	Equity Income	7.2	-29.8	0.4	33.8	0.90	301	None	4	1	1	1	1	1	5
Madison Investors Y	MINVX	Multi-Cap Core	7.5	-46.8	0.4	42.0	0.90	367	None	4	2	1	1	2	2	4
Meridian Contrarian Legacy	MVALX	Small-Cap Core	9.8	-44.1	1.2	26.8	1.13	587	HR	5	1	1	1	4	4	5
Parnassus Core Equity Inv	PRBLX	Equity Income	10.4	-35.6	3.5	28.3	0.86	22,117	HR	5	1	1	1	1	1	5
Principal Capital Appreciation A	CMNWX	Multi-Cap Core	9.4	-47.4	2.3	33.9	0.86	1,967	None	5	2	3	3	3	3	5
Provident Trust Strategy	PROVX	Large-Cap Core	8.0	-34.5	1.1	33.8	1.00	234	None	5	1	1	1	1	1	5
Saturna Amana Income Inv	AMANX	Equity Income	8.7	-34.7	1.8	34.3	1.06	1,428	HR	5	1	1	1	1	1	5
Touchstone Balanced A	SEBLX	Mixed-Asset Target Alloc Growth	7.2	-33.3	0.9	60.9	1.02	476	HR	4	1	1	1	3	3	5
Touchstone Large Cap Focused A	SENCX	Large-Cap Core	8.4	-47.6	1.5	60.9	1.04	1,904	HR	5	2	2	2	1	1	5
Transamerica Capital Growth A	IALAX	Multi-Cap Growth	12.5	-52.6	4.6	21.7	1.14	4,971	HR	5	3	5	2	4	4	5
Tributary Balanced Inst	FOBAX	Mixed-Asset Target Alloc Growth	7.8	-35.0	1.5	24.3	1.04	75.7	None	5	2	2	1	4	4	5
Vanguard International Growth Inv	VWIGX	International Large-Cap Growth	8.4	-57.0	2.9	39.2	0.44	64,060	HR	5	4	5	4	6	6	5
Vanguard LifeStrategy Income Inv	VASIX	Mixed-Asset Target Alloc Consv	5.0	-15.5	-0.3	26.2	0.11	5,834	None	2	1	1	1	1	1	5
Vanguard STAR Inv	VGSTX	Mixed-Asset Target Alloc Growth	7.5	-35.6	1.2	35.6	0.31	25,869	HR	5	2	2	2	5	5	5
Wasatch Micro Cap Inv	WMICX	Small-Cap Growth	14.3	-60.8	5.1	25.4	1.66	1,006	HR	5	5	4	2	7	7	5