
Morningstar Guide To Mutual Funds Five Star Strategies For Success

und fact sheet u guide - prudential retirement - fund/portfolio category morningstar, an investment research and investment management firm, assigns each mutual fund to a category, based on their actual **the morningstar category classifications** - the morningstar category classifications (for portfolios available for sale in the united states) morningstar methodology paper effective june 30th, 2016 **fidelity government money market fund (spaxx)** - money market ntf lower higher fidelity® government money market fund (spaxx) no transaction fee 1 performance3,4,5 average annual total returns monthly (as of 2/28/2019) ytd (monthly) 1 yr 3 yrs 5 yrs 10 yrs life **morningstar advisor workstationsm advisor group edition** - morningstar advisor workstationsm portfolio, equ portfolio snapshottm provides an in-depth synopsis of a client's portfolio with asset class and investment style breakdowns, performance **cash 4.95% - prudential retirement** - massmutual select mid cap growth i a mutual fund fourth quarter 2018 fund fact sheet 1001675 key facts investment advisor: mml investment advisers, llc **event driven equity fund - blackrock** - 2 % of net assets represents the fund's exposure based on the economic value of securities and is adjusted for futures, options, swaps, and convertible bonds. **john hancock multimanager lifestyle moderate portfolio** - i portfolio highlights1 (%) bond fund (jham) 8.33 core bond fund (wells capital) 7.95 total return fund (pimco) 7.92 strategic income opportunities fund (jham) 5.95 **cref stock account r3 qcstix - tiaa** - cref retirement annuity accounts cref stock account class r3 equities as of 12/31/2018 morningstar disclosure continued on next page... morningstar rating and morningstar style box (if shown), category information and risk disclosures provided by morningstar, inc. ©2019 morningstar, inc. **lsv funds lsv value equity fund** - lsv value equity fund as of september 30, 2018 overall morningstar® rating investment style status ÛÛÛ large value open morningstar analyst rating **vanguard® lifestrategy® moderate growth fund - investor shares** - vanguard® lifestrategy® moderate growth fund - investor shares release date 12-31-18....tegrory..... **invesco equally-weighted s&p 500 fund fact sheet (pdf)** - invesco equally-weighted s&p 500 fund large-cap blend mutual fund retail share classes data as of dec. 31, 2018 investment objective the fund seeks total return through growth of capital **invesco equity and income fund fact sheet (pdf)** - invesco equity and income fund balanced mutual fund retail share classes data as of dec. 31, 2018 investment objective the fund seeks current income and, secondarily, capital **socially conscious funds list - charles schwab** - socially conscious funds list first quarter 2019 3 leading fund—see page 8 for criteria. * “schwab onesource®” refers to mutual funds that are participating in schwab mutual fund onesource® service or etfs participating in schwab etf onesource.™ **wells fargo/blackrock s&p500 idx cit f** - not fdic insured z no bank guarantee z may lose value investment in retirement plans: wells fargo/blackrock s&p500 idx cit f investment objective **pioneer multi-asset ultrashort income fund** - pioneer multi-asset ultrashort income fund usundipioneer a word about risk all investments are subject to risk, including the possible loss of principal. **vanguard® target retirement 2065 fund - investor shares** - vanguard® target retirement 2065 fund - investor shares release date 12-31-18....tegrory..... **debunking some myths and misconceptions about indexing** - 3 4 for documentation of points in this paragraph, as well as a summary of studies on performance persistence, see philips et al. (2014). income, for example, fears of investing in “the most **investors mutual australian share fund** - global sharemarketscontinued to rebound strongly in february with the msciworld index gaining +2.5%. the gainswere broad based across all major bourses with the us s&p500 gaining +3.2%, bringing the calendar year to date return to +11%. **janus henderson vit balanced portfolio qqqqq out of 8082 ...** - pacific life insurance company contracts morningstar inc., for a fee, as a third-party advisor to produce this fact sheet. in this capacity, morningstar independently provides analysis on the **alternative strategies fund - masters funds** - contact us at (925) 254-8999 or lg-fa@lgam alternative strategies fund masfx, masnx mastersfunds fourth quarter 2018 securities. investing in f **quarterly performance report as of september 30 2018** - quarterly performance report as of september 30, 2018 it is the policy ofthe department of financial services(dfs) to make available a broad range of investment options that **fi360 fund family fiduciary rankings** - fi360 fund family fiduciary rankings™ data as of june 30, 20151 overview 2 what is the fi360 fiduciary score®? 2 appendix a – fi360 fund family fiduciary rankings **u.s. large cap equity index fund** - portfolio analysis composition as of 12-31-18 % assets u.s. stocks 98.2 non-u.s. stocks 0.8 bonds 0.0 cash 0.9 other 0.0 morningstar equity style box ™ as of 12-31-18 % mkt cap **market review and outlook q4 2018 - live mutual** - 3 investors concerns over slowing global economic growth drove stock market volatility higher and prices lower source: morningstar direct™ as of 12/31/18 **technology solutions matrix. - v2020** - financial advisor use only. managing clients # system/service description cost 24 cashedge powered by alldata generate a holistic view of client assets and liabilities in one location. ***for illustrative purposes only.** **blackrock us debt index fd w** - blackrock us debt index fd w volatility meter* the investment volatility, when shown, is a function of the investment option's morningstar 3-year risk rating. **emerging markets multi-asset portfolio - hsbc** - emerging markets multi-asset portfolio 4q 2018 this information is directed solely at persons in jurisdictions where the funds and relevant share class are registered or who may otherwise lawfully

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