

6C CTG- Free Online Mutual Fund Screeners

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Free Online Mutual Fund Screeners



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Classes-To-Go! 6C

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Disclaimer

- The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced.



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What Makes a Good Screen

- Easy to use and understand.
- Robust database.
- Reliable, relative, current information.
- Preset screens.
- Range of values.

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Free Popular Websites

- Yahoo!Finance
- MSN Money
- Morningstar

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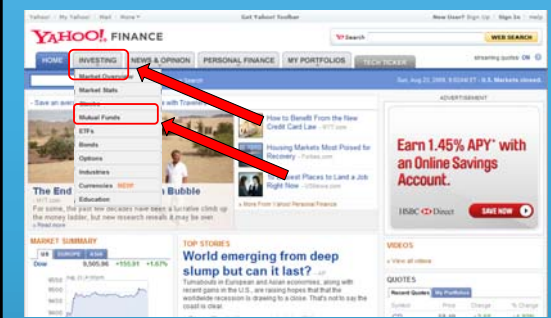
Subscription Websites

- Premium Morningstar
- BI Online Tools

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www.finance.yahoo.com



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Money Central

- Top Performing Funds
- Fund Categories
- Mid-Cap Blend

Top-Performing Funds

All Categories
View Top Funds across all fund categories.

Top-Performing Funds
Top-Rated Funds
Most Money Held Funds

Fund Categories
Select one of the following categories to view top performers.

Currency Funds

- Domestic (DIA) Stock Funds
- Large Blend
- Large Growth
- Large Mid-Cap
- Large Value
- Mid-Cap Blend
- Mid-Cap Growth
- Mid-Cap Value
- Small Blend
- Small Growth
- Small Value

General Bond Funds

- Intermediate-Term Bond
- Long-Term Bond
- Short-Term Bond
- 20+ Year Bond

Government Bond Funds

- Diversified Government
- Intermediate Government
- Long Government
- Short Government
- 20+ Year Government

Hybrid Funds

- Conservative Allocation
- Conservative Growth
- Conservative Income
- Conservative Mid-Cap
- Conservative Value
- Conservative Growth
- Conservative Income
- Conservative Mid-Cap
- Conservative Value

International Stock Funds

- Diversified Emerging Mkts
- Diversified International
- Europe Stock
- Europe Growth
- Europe Value
- Europe Small-Cap
- Europe Small-Mid Value
- Japan Stock
- Latin America Stock
- North America Sector
- World Stock

Specialty Bond Funds

- Emerging Markets Bond
- High Yield Bond
- Municipal Bond
- World Bond

Risk-Factor Funds

- Small Cap
- Value
- Energy
- Healthcare
- Technology
- Utilities

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Money Central

- Top 10 Performing Mid Cap Blend Funds Last 3 Months.
- Top 10 Performing Mid Cap Blend Funds Last 3 Years.

Top Funds
View Top Performers

Category: Mid-Cap Blend Funds
Top-Performing Funds

Most money funds with the best performance in their category for the last 3 months.

Fund Category	1 Year	3 Months	1 Year	3 Months
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%
Mid-Cap Blend	10.12%	10.12%	10.12%	10.12%

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Money Central

- Fund Power Searches
- Basic Search
- Deluxe Search
- Small Domestic Stock Fund

Basic Searches

These searches look for top funds using a few basic criteria:

- Small Domestic Stock Fund**
Funds that invest in the stocks of companies with market capitalizations of less than \$2 billion.
- World Stock Fund**
Funds that invest in the stocks of companies around the world.
- Large Domestic Stock Fund**
Funds that invest in the stocks of large companies with market capitalizations of \$10 billion or more.
- Bond Fund**
Funds that invest in bonds.

Deluxe Fund Searches

These searches look for top funds using a more sophisticated set of criteria:

- High Yield Bond Fund**
Funds that invest in high-yield bonds.
- Mid-Cap Growth Fund**
Funds that invest in the stocks of mid-cap growth companies.
- Value Fund**
Funds that invest in value stocks.

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Money Central

- Small Domestic Stock Fund
- 25 Funds with Highest 1 Year Total Return
- MSF New Discovery I

Small Domestic Stock Fund

Fund	1 Year	3 Months	1 Year	3 Months
MSF New Discovery I	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock Fund	10.12%	10.12%	10.12%	10.12%

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- MSF New Discovery I

MSF New Discovery I: Snapshot

Category	1 Year	3 Months	1 Year	3 Months
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%
Small Domestic Stock	10.12%	10.12%	10.12%	10.12%

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www.morningstar.com

- Tools Tab
- Basic Screener

Tools Tab

Basic Screener

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Morning Star

- Basic Screener
- Preset Screens

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Morningstar

- Preset Screens

Morningstar Screens

- Long-Term Winners
- Solid Small-Growth Funds
- Standout Foreign-Stock Funds
- Conservative Bond Funds
- Little Funds with Big Returns

Our analysts have built some starter screens for you. Whether you are looking for funds with consistent long-term returns, low expenses, or an international presence, we've defined the criteria to help you sort through your investment options.

Just click on a fund list to the left of these instructions to view the analyst screening criteria, then click Show Screen Results to see which funds made the cut.

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Morningstar

- Screen Category
- Results

Morningstar Screens

- Long-Term Winners
- Solid Small-Growth Funds
- Standout Foreign-Stock Funds
- Conservative Bond Funds
- Little Funds with Big Returns

Solid Small-Growth Funds
A good small-growth fund is hard to find. We looked for funds with above-average risk-adjusted returns where expenses and asset size weren't out of control.

[Show Screen Results](#)

Search Criteria for Solid Small-Growth Funds:
 Morningstar Category equal to Small Growth
 Minimum Initial Purchase less than or equal to \$3,000
 Expense Ratio less than or equal to Category Average
 Morningstar Rating equal to 4 or 5
 Total Assets less than or equal to \$5 bl

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Small Growth Funds

- 25 of 92 Funds
- Score Results
- Fidelity Small Cap Growth

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Small Growth Funds

- Fidelity Small Cap Growth

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Premium Morningstar Home Page

- Fund Screener

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Custom Fund Screener

- Preset Screens

Number of Funds that pass your screen

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Preset Screens

- Select Screen

Click button to view results

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Preset Screens

- Portfolio Anchors

Click button to view results

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Preset Screens

- Edit Screen Criteria

Matches	Screen	Portfolio Anchors	
2147	(Fund Category = Large Blend)		Change Load Remove
6695	and (Distinct Portfolio Only = Yes)		Change Load Remove
9216	and (Fund Manager Tenure >= 5)		Change Load Remove
7251	and (Expense Ratio <= 1.00)		Change Load Remove
7534	and (5 Yr Return % Rank, Category <= 50)		Change Load Remove
10536	and (Minimum Initial Purchase <= 10000)		Change Load Remove
90 Funds pass your screen.			

Click button to view results

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Preset Screens

- Edit Screen Criteria

OK Cancel

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Preset Screens

- Edit Screen Criteria

OK Cancel

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BI Mutual Fund Screening Tool

Expense Ratio
Load Fee

Mutual Fund Screening Tool

Category: Any
Style: Any
Family: Any

5 Yr. Sales Growth: Any
5 Yr. EPS Growth: Any

Manager Tenure: >= 5 years
Avg. Annual Return 3-Year: Any
Avg. Annual Return 5-Year: Any
Avg. Annual Return 10-Year: Any
Average Turnover: Any

Expense Ratio: Any
Load: Any
Minimum Purchase: No Load
Avg. Credit Quality: Any
Average Duration (years): Any

SEARCH START OVER

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BI Mutual Fund Screening Tool

Criteria Used

- Manager Tenure >= 5 years
- Avg. Annual Return 3-Year >= S&P 500 Index
- Avg. Annual Return 5-Year >= S&P 500 Index
- Avg. Annual Return 10-Year >= S&P 500 Index
- Expense Ratio <= 1%
- Load No Load

Search Results (1 - 50 of 75 items) next

Criteria Selected
Funds Found - 75
Fund
5Yr Return

Fund	Style	5Yr Return %	Total Assets (\$M)
DFA Emg Mkts Value I (DFEVX)	Emerging Markets Funds	19.32	5757.2
DFA Emg Mkts II (DFETX)	Emerging Markets Funds	15.39	144.7
BlackRock Ntrl Res I (MAGRX)	Global Natural Resources	15.33	53.2
DFA Emg Mkts I (DFEMX)	Emerging Markets Funds	15.08	1691.0
Vanguard EM St Id Inst (VEMIX)	Emerging Markets Funds	14.69	1317.3

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BI Mutual Fund Screening Tool

Selected Fund

Search Results (1 - 50 of 75 items) next

Fund	Style	5-Yr Return %	Total Assets (\$M)
DFA Emg Mkts Value I (DFEVX)	Emerging Markets Funds	19.32	5757.2
DFA Emg Mkts II (DFETX)	Emerging Markets Funds	15.39	144.7
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BI The Fund Checklist

Stock Fund Check List: Meridian Growth Fund

Fund Information

Fund Name: Meridian Growth Fund
Category: Domestic Equity
Symbol: MERDX
Style: Equity Small Cap Growth
Minimum Purchase(s): 1000
Add'l(s): 50
Minimum IRA Purchase(s): 1000
Add'l(s): 50
Data Reference: Standard & Poor's
NAVE: 39.24 (12/29/2008)
Total Assets(\$M): 1,867.2 (12/29/2008)

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Questions?

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