



Advisor Mutual Fund Program

MORNINGSTAR® 4- AND 5- STAR RATED FUNDS

Top Star-Rated Funds Per Asset Class

The mutual funds listed below are funds available in the Advisor Mutual Fund Program and have no relation to the portfolios models available.

There are additional mutual funds available in the Advisor Mutual Fund Program that are not reflected in this list that have either no Morningstar Rating or have less than an overall 4 star Rating.

Name	Morningstar® Category	Ratings (as of 03/31/2026)				Number of Funds in Category		
Core Bonds		Overall	3-yr	5-yr	10-yr	3-yr	5-yr	10-yr
∅ Calvert Core Bond	Intermediate Core Bond	★★★★	★★★	★★★	★★★★★	417	377	279
Guggenheim Core Bond	Intermediate Core Bond	★★★★	★★★★	★★★	★★★★★	417	377	279
Guggenheim Total Return Bond	Intermediate Core-Plus Bond	★★★★	★★★	★★★	★★★★	496	455	355
Global/International								
American Funds® New Perspective Fund®	Global Large-Stock Growth	★★★★	★★★★	★★★★	★★★★	299	274	193
Avantis® Emerging Markets Equity	Diversified Emerging Mkts	★★★★	★★★★	★★★★	N/A	694	617	461
Fidelity® Advisor International Capital Appreciation	Foreign Large Growth	★★★★	★★★	★★★	★★★★	359	332	225
Vanguard® Developed Markets Index	Foreign Large Blend	★★★★	★★★★	★★★★	★★★★	655	617	486
Large Cap								
Allspring Large Cap Core	Large Blend	★★★★	★★★★	★★★★	★★★	1212	1122	886
American Century Ultra®	Large Growth	★★★★	★★★	★★★	★★★★	998	937	763
American Funds® American Mutual Fund®	Large Value	★★★★	★★★	★★★	★★★★	1048	983	823
American Funds® Washington Mutual Investors Fund SM	Large Value	★★★★★	★★★★	★★★★	★★★★★	1048	983	823
BNY Mellon Dynamic Value	Large Value	★★★★★	★★★★	★★★★★	★★★★★	1048	983	823
JPMorgan Growth Advantage	Large Growth	★★★★	★★★	★★★	★★★★	998	937	763
Neuberger Large Cap Value	Large Value	★★★★	★★	★★	★★★★★	1048	983	823
Vanguard® 500 Index	Large Blend	★★★★	★★★★	★★★★	★★★★	1212	1122	886
Vanguard® Growth Index	Large Growth	★★★★	★★★★	★★★★	★★★★	998	937	763
Vanguard® Value Index	Large Value	★★★★	★★★★	★★★★	★★★★	1048	983	823

Name	Morningstar® Category	Ratings (as of 03/31/2026)				Number of Funds in Category		
Mid Cap		Overall	3-yr	5-yr	10-yr	3-yr	5-yr	10-yr
Invesco Value Opportunities	Mid-Cap Value	★★★★★	★★★★★	★★★★★	★★★★★	388	367	300
Vanguard® Mid Cap Index	Mid-Cap Blend	★★★★	★★★	★★★	★★★★	365	341	263
Vanguard® Mid-Cap Value Index	Mid-Cap Value	★★★★	★★★★	★★★★	★★★★	388	367	300
Virtus Ceredex Mid Cap Value Equity	Mid-Cap Blend	★★★★	★★★★	★★★★	★★★	365	341	263
Small Cap								
Avantis® U.S. Small Cap Value	Small Value	★★★★★	★★★★★	★★★★★	N/A	460	437	360
Invesco Discovery	Small Growth	★★★★★	★★★★★	★★★★	★★★★★	522	500	399
Needham Aggressive Growth	Small Growth	★★★★★	★★★★★	★★★★★	★★★★★	522	500	399
Royce Small-Cap Opportunity	Small Value	★★★★	★★★	★★	★★★★★	460	437	360
Vanguard® Small Cap Index	Small Blend	★★★★	★★★★	★★★	★★★★	580	558	440
Vanguard® Small-Cap Value Index	Small Value	★★★★	★★★★	★★★★	★★★★	460	437	360
Victory RS Partners	Small Value	★★★★	★★★	★★★★	★★★★★	460	437	360
Specialty Bonds								
American Century Short Duration Strategic Income	Short-Term Bond	★★★★	★★★	★★★	★★★★	525	496	379
∅ Calvert Flexible Bond	Multisector Bond	★★★★	★★★	★★★★	★★★★	339	305	216
Fidelity® Advisor Capital & Income	High Yield Bond	★★★★★	★★★★★	★★★★★	★★★★★	581	538	437
Franklin High Income	High Yield Bond	★★★★	★★★★	★★★★	★★★★★	581	538	437
Guggenheim Macro Opportunities	Nontraditional Bond	★★★★	★★★★	★★★	★★★★	191	174	121
JPMorgan Short Duration Core Plus	Short-Term Bond	★★★★	★★★	★★★	★★★★★	525	496	379
PIMCO Emerging Markets Bond	Emerging Markets Bond	★★★★	★★★	★★★	★★★★	203	190	132
PIMCO International Bond (U.S. Dollar-Hedged)	Global Bond-USD Hedged	★★★★	★★★	★★★	★★★★	103	99	64
Vanguard® Short-Term Inflation-Protected Securities Index	Short-Term Inflation-Protected Bond	★★★★	★★★★	★★★★	★★★★	63	62	52
Sector								
Baron Real Estate	Real Estate	★★★★	★★★★	★★	★★★★★	197	190	149
Fidelity Advisor® Technology	Technology	★★★★	★★★★	★★★★	★★★★	221	199	150
Invesco Energy	Equity Energy	★★★★	★★★★	★★★★★	★★★	67	62	57
Invesco Gold & Special Minerals	Equity Precious Metals	★★★★	★★★	★★★	★★★★	62	62	56
Janus Henderson Global Life Sciences	Health	★★★★★	★★★★	★★★★	★★★★★	164	151	119
NAA Risk Managed Real Estate	Real Estate	★★★★	★★★	★★★★	★★★★★	197	190	149
PGIM Jennison Utility	Utilities	★★★★	★★★	★★★	★★★★	53	49	44
Vanguard® Information Technology Index	Technology	★★★★	★★★	★★★★	★★★★	221	199	150

Name	Morningstar® Category	Ratings (as of 03/31/2026)				Number of Funds in Category		
Asset Allocation/Target Date		Overall	3-yr	5-yr	10-yr	3-yr	5-yr	10-yr
T. Rowe Price Retirement 2015	Target-Date 2015	★★★★	★★★★	★★★	★★★★	81	77	56
T. Rowe Price Retirement 2020	Target-Date 2020	★★★★	★★★★	★★★	★★★★	95	91	61
Vanguard® Target Retirement 2025	Target-Date 2025	★★★★	★★★★	★★★★	★★★★	125	120	83
Vanguard® Target Retirement 2030	Target-Date 2030	★★★★	★★★★★	★★★★	★★★★	181	176	115
Vanguard® Target Retirement 2035	Target-Date 2035	★★★★	★★★★	★★★★	★★★★	178	168	116
Vanguard® Target Retirement 2040	Target-Date 2040	★★★★	★★★★	★★★★	★★★★	174	169	115
Vanguard® Target Retirement 2045	Target-Date 2045	★★★★	★★★★	★★★★	★★★★	173	168	116
Vanguard® Target Retirement 2050	Target-Date 2050	★★★★	★★★★	★★★★	★★★★	174	169	115
Vanguard® Target Retirement 2055	Target-Date 2055	★★★★	★★★★	★★★★	★★★★	173	168	115
Vanguard® Target Retirement 2060	Target-Date 2060	★★★★	★★★★	★★★★	★★★★	173	168	82
Vanguard® Target Retirement 2065	Target-Date 2065+	★★★★	★★★★	★★★★	N/A	169	132	0
Vanguard® Target Retirement 2070	Target-Date 2065+	★★★★	★★★★	N/A	N/A	169	132	0
Asset Allocation/Lifestyle								
American Funds® American Balanced Fund®	Moderate Allocation	★★★★★	★★★★★	★★★★★	★★★★	465	445	371
Calamos® Growth and Income	Moderately Aggressive Allocation	★★★★★	★★★★	★★★★	★★★★★	123	117	100
Macquarie Asset Strategy	Global Moderate Allocation	★★★★	★★★★	★★★★	★★★★	408	394	325
T. Rowe Price Capital Appreciation	Moderate Allocation	★★★★	★★★	★★★★	★★★★★	465	445	371

∅ ESG funds noted with this symbol are funds identified by Morningstar as ESG funds pursuant to the Morningstar criteria. Morningstar defines "Sustainable Investment" as a fund that explicitly indicates any kind of sustainability, impact, or ESG strategy in their prospectus or offering documents. "ESG Funds" incorporate environmental, social, and governance (ESG) principles into the investment process or engagement activities. "Impact Funds" seek to make a measurable impact with investments on specific issue areas like Gender Diversity or Community development alongside financial return. "Environmental Sector Funds" are non-diversified funds that invest in environmentally oriented industries like renewable energy or water.

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This material must be accompanied by the Advisor Mutual Fund Program's most recent quarter end performance report.

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