



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 03/31/2024)				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	★★★★★	★★★	★★★★★	★★★★★	426	385	275
Guggenheim Core Bond	Intermediate Core Bond	★★★★	★★	★★★★	★★★★★	426	385	275
Guggenheim Total Return Bond	Intermediate Core-Plus Bond	★★★★	★★★	★★★★	★★★★★	557	527	368
Invesco Core Plus Bond	Intermediate Core-Plus Bond	★★★★	★★★	★★★	★★★★	557	527	368
Global/International								
Vanguard® Developed Markets Index	Foreign Large Blend	★★★★	★★★	★★★	★★★★	696	646	425
Fidelity® Advisor International Capital Appreciation	Foreign Large Growth	★★★★★	★★★★	★★★★	★★★★★	383	327	223
BlackRock® Global Allocation	Global Allocation	★★★★	★★	★★★★	★★★★	356	338	244
Delaware Ivy Asset Strategy	Global Allocation	★★★★	★★★★★	★★★★★	★★★	356	338	244
American Funds® New Perspective Fund®	Global Large-Stock Growth	★★★★	★★★	★★★★	★★★★	322	279	188
Large Cap								
Vanguard® 500 Index	Large Blend	★★★★★	★★★★	★★★★	★★★★★	1293	1179	888
American Century Select	Large Growth	★★★★	★★★	★★★★	★★★★	1111	1037	807
American Century Ultra®	Large Growth	★★★★	★★★	★★★★	★★★★	1111	1037	807
Delaware Ivy Large Cap Growth	Large Growth	★★★★	★★★★	★★★★	★★★★	1111	1037	807
JPMorgan Growth Advantage	Large Growth	★★★★★	★★★	★★★★★	★★★★★	1111	1037	807
American Funds® American Mutual Fund®	Large Value	★★★★	★★★★	★★★★	★★★★	1118	1058	816
BNY Mellon Dynamic Value	Large Value	★★★★★	★★★★★	★★★★★	★★★★	1118	1058	816
Mid Cap								
Vanguard® Mid Cap Index	Mid-Cap Blend	★★★★	★★★	★★★	★★★★	392	360	252
Baron Asset	Mid-Cap Growth	★★★★	★★★	★★★	★★★★	520	489	393
Invesco Value Opportunities	Mid-Cap Value	★★★★	★★★★★	★★★★	★★★	380	363	281
Victory RS Value	Mid-Cap Value	★★★★	★★★★	★★★	★★★★	380	363	281

Name	Morningstar® Category	Ratings (as of 03/31/2024)				Number of Funds in Category		
Small Cap		Overall	3-yr	5-yr	10-yr	3-yr	5-yr	10-yr
∅ Calvert Small-Cap	Small Blend	★★★★	★★★	★★★★	★★★★★	584	552	384
Vanguard® Small Cap Index	Small Blend	★★★★	★★★	★★★	★★★★★	584	552	384
Invesco Discovery	Small Growth	★★★★★	★★★	★★★★★	★★★★★	552	520	400
Needham Aggressive Growth	Small Growth	★★★★★	★★★★★	★★★★★	★★★★★	552	520	400
Allspring Small Company Value	Small Value	★★★★	★★★	★★★★	★★★★	457	426	335
Victory RS Partners	Small Value	★★★★★	★★★★	★★★★★	★★★★★	457	426	335
Specialty Bonds								
Guggenheim Floating Rate Strategies	Bank Loan	★★★★	★★★★	★★★★	★★★★	214	206	169
PIMCO International Bond (U.S. Dollar-Hedged)	Global Bond-USD Hedged	★★★★	★★★★	★★★★	★★★★	108	101	62
Fidelity® Advisor High Income Advantage	High Yield Bond	★★★★★	★★★★	★★★★★	★★★★★	606	575	432
Franklin High Income	High Yield Bond	★★★★	★★★★	★★★★	★★★	606	575	432
Guggenheim High Yield	High Yield Bond	★★★★	★★★★	★★★	★★★★	606	575	432
Calvert Flexible Bond	Nontraditional Bond	★★★★	★★★★	★★★★	N/A	278	250	161
Guggenheim Macro Opportunities	Nontraditional Bond	★★★★	★★★	★★★★	★★★★	278	250	161
American Century Short Duration Strategic Income	Short-Term Bond	★★★★	★★★	★★★★	N/A	534	494	359
Sector								
Invesco Gold & Special Minerals	Equity Precious Metals	★★★★	★★★	★★★★★	★★★★	64	62	56
Janus Henderson Global Life Sciences	Health	★★★★	★★★★	★★★★	★★★★	159	136	114
Baron Real Estate	Real Estate	★★★★★	★★★	★★★★★	★★★★★	236	217	160
Guggenheim Risk Managed Real Estate	Real Estate	★★★★★	★★★★★	★★★★★	★★★★★	236	217	160
Fidelity Advisor® Technology	Technology	★★★★★	★★★★★	★★★★★	★★★★	232	204	158
PGIM Jennison Utility	Utilities	★★★★	★★★★	★★★★	★★★	59	58	51
Asset Allocation/Target Date								
T. Rowe Price Retirement 2010	Target-Date 2000-2010	★★★★	★★★	★★★★	★★★★	105	100	51
T. Rowe Price Retirement 2015	Target-Date 2015	★★★★	★★★	★★★★	★★★★	102	93	49
T. Rowe Price Retirement 2020	Target-Date 2020	★★★★	★★★★	★★★★	★★★★	133	124	67
T. Rowe Price Retirement 2025	Target-Date 2025	★★★★	★★★	★★★★	★★★★	197	173	107
T. Rowe Price Retirement 2030	Target-Date 2030	★★★★	★★★	★★★★	★★★★	199	171	105
T. Rowe Price Retirement 2035	Target-Date 2035	★★★★	★★★	★★★	★★★★	190	170	104
Vanguard® Target Retirement 2020	Target-Date 2020	★★★★	★★★	★★★	★★★★	133	124	67
Vanguard® Target Retirement 2025	Target-Date 2025	★★★★	★★★★	★★★★	★★★★	197	173	107
Vanguard® Target Retirement 2030	Target-Date 2030	★★★★	★★★	★★★★	★★★★	199	171	105
Vanguard® Target Retirement 2035	Target-Date 2035	★★★★	★★★★	★★★	★★★★	190	170	104
Vanguard® Target Retirement 2040	Target-Date 2040	★★★★	★★★	★★★	★★★★	193	171	105
Vanguard® Target Retirement 2045	Target-Date 2045	★★★★	★★★	★★★	★★★★	190	170	104
Vanguard® Target Retirement 2050	Target-Date 2050	★★★★	★★★	★★★	★★★★	191	171	105
Vanguard® Target Retirement 2055	Target-Date 2055	★★★★	★★★	★★★★	★★★★	190	170	98
Vanguard® Target Retirement Income	Target-Date Retirement	★★★★	★★★	★★★	★★★★	145	127	79

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Asset Allocation/Lifestyle		Overall	3-yr	5-yr	10-yr	3-yr	5-yr	10-yr
American Century Strategic Allocation: Conservative	Moderately Conservative Allocation	★★★★	★★★	★★★★	★★★★	441	409	297
T. Rowe Price Capital Appreciation	Moderate Allocation	★★★★★	★★★★★	★★★★★	★★★★★	686	646	487
Calamos® Growth and Income	Moderately Aggressive Allocation	★★★★★	★★★★	★★★★★	★★★★★	302	274	225
Invesco Equity and Income	Moderately Aggressive Allocation	★★★★	★★★★	★★★★	★★★	302	274	225
Nontraditional Bond								
JPMorgan U.S. Government Money Market	Money Market - Taxable	N/A	N/A	N/A	N/A	N/A	N/A	N/A

⊗ 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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Morningstar Rankings: For each fund with at least a three-year history, Morningstar calculates a Morningstar Rating[™] based on a Morningstar risk-adjusted return measure that accounts for variation in a fund's monthly performance (including the effects of sales charges, loads, and redemption fees), placing more emphasis on downward variations and rewarding consistent performance. The top 10% of funds in each category receive 5 stars, the next 22.5% receives four stars, the next 35% receives three stars, the next 22.5% receives two stars and the bottom 10% receives one star. (Each share class is counted as a fraction of one fund within this scale and rated separately, which may cause slight variations in the distribution percentages.) The overall

Morningstar Rating for a fund is derived from a weighted average of the performance figures associated with its three-, five-, and ten-year (if applicable) Morningstar Rating[™] metrics.

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