

Funds Missing the Cutoffs

Fund/Ticker	Category	Benchmark	Analyst Rating	Risk	Expense Ratio (%)	Expense Rank	Highest Manager Invstmnt	Longest Manager Tenure	Fund Return	Index Return
American Funds Capital Wrld Gr&Inc CWGIX	World Large Stock	MSCI ACWI NR USD	Gold	Average	0.79	27	7	24.0	10.53	
American Funds Europacific Growth AEPGX	Foreign Large Growth	MSCI EAFE Lrg Grwth NR USD	Gold	Below Avg	0.83	30	7	25.2	8.53	4.09
American Funds Global Balanced GBLAX	World Allocation	Morningstar Gbl Alloc TR USD	Silver	Average	0.85	32	7	6.1	6.11	5.52
American Funds New Perspective ANWPX	World Large Stock	MSCI ACWI NR USD	Gold	Average	0.77	25	7	16.3	7.31	4.82
American Funds New World NEWFX	Diversified Emerging Mkts	MSCI ACWI NR USD	Gold	Low	1.07	49	7	17.8	7.81	4.33
Berwyn Income BERIX	Alloc—15% to 30% Eq	Citi USBIG	Silver	Average	0.66	18	6	10.9	7.04	1.65
Diamond Hill Long-Short DIAMX	Long-Short Equity	Russell 1000 TR USD	Bronze	Average	1.39	70	7	16.7	6.77	5.25
Dodge & Cox Balanced DODBX	Alloc—50% to 70% Eq	S&P 500 TR USD	Gold	High	0.53	10	7	31.2	10.56	23.05
Dodge & Cox Global Stock DODWX	World Large Stock	MSCI World NR USD	Gold	High	0.63	16	7	8.9	5.94	4.52
Dodge & Cox International Stock DODFX	Foreign Large Blend	MSCI EAFE Large NR USD	Gold	High	0.64	16	7	15.9	7.76	4.20
Dodge & Cox Stock DODGX	Large Value	S&P 500 TR USD	Gold	High	0.52	10	7	25.2	11.58	9.43
Fidelity Leveraged Company Stock FLVCX	Mid-Cap Value	S&P 500 TR USD	Bronze	High	0.80	28	1	0.5	22.13	20.06
Fidelity Low-Priced Stock FLPSX	Mid-Cap Value	Russell 2000 TR USD	Silver	Below Avg	0.88	34	7	27.2	13.77	9.61
Mairs & Power Balanced MAPOX	Alloc—50% to 70% Eq	Morningstar Mod Tgt Rsk TR USD	Silver	Average	0.72	22	7	11.2	7.27	5.99
PRIMECAP Odyssey Agg Growth POAGX	Mid-Cap Growth	S&P 500 TR USD	Gold	High	0.63	16	7	12.4	13.21	8.11
Perkins Small Cap Value JSCVX	Small Value	Russell 2000 Value TR USD	Silver	Low	0.59	13	7	18.6	12.42	10.65
Perkins Mid Cap Value T JMCVX	Mid-Cap Value	Russell Mid Cap Value TR USD	Bronze	Low	1.13	54	7	32.1	12.22	10.95
T. Rowe Price Blue Chip Growth TRBCX	Large Growth	S&P 500 TR USD	Silver	Above Avg	0.72	22	7	23.7	10.47	9.38

Why didn't a fund make the cut? Here we highlight in red the datapoint that kept a fund out of the Fantastic 40 this year. Red indicates where test was failed.