

MFO Premium

MultiSearch Input Parameter List



<p><u>Basic Info</u></p> <ol style="list-style-type: none"> 1) Category (Up To 25) 2) Objective (Up To 25) 3) SubType (Up To 9) 4) Asset Universe (Up To 3) 5) Type (Up To 3) 6) Age 7) Oldest Share Class (OSC) 8) Assets Under Management (AUM) Min, Max 9) AUM Position (In Category & Of All Rated Funds) 10) Index 11) Socially Conscious 12) ETF 12) Manager Tenure 13) Fund Names (Up To 10) 14) Symbols (Up To 25) 15) Advisers (Up To 5) 16) Manager (Up To 5) 17) Management Company Location (City & State) 18) Fund of Funds 19) Yield <p><u>Period Metrics & Ratings</u></p> <ol style="list-style-type: none"> 20) Display Period 21) MFO Risk (Up To 4) 22) MFO Rating & Rank 23) Max Volatility 24) Annualized Percent Return (APR) Rating, Rank & Value 25) Excess Return 26) Max Drawdown (MAXDD) Rating & Value 27) Recovery Time Rating & Value 28) Standard Deviation (STDEV) Rating & Value 29) Downside Deviation (DSDEV) Rating & Value 30) Ulcer Index Rating & Value 31) Bear Rating 32) Sharpe Ratio Rating & Value 33) Sortino Ratio Rating & Value 34) Martin Ratio <p><u>Correlation Metrics</u></p> <ol style="list-style-type: none"> 35) Upside Capture 36) Downside Capture 37) Capture Ratio 	<p><u>Capture Metrics</u></p> <ol style="list-style-type: none"> 38) Correlation R (vs Peer, SP500, USBond & ACIUS) 39) R-squared (R2 vs Peer, SP500, USBond & ACIUS) 40) Beta <p><u>Composite Period Ratings</u></p> <ol style="list-style-type: none"> 41) Composite MFO Risk (Up to 4) 42) Composite MFO Rating 43) Composite Sharpe Ratio 44) Composite APR <p><u>MFO Designations</u></p> <ol style="list-style-type: none"> 45) Great Owl 46) Fund Alarm 47) Profiled Funds (“David’s Take”) 48) Pre-Set Screens 49) Fund Family (Up To 5) 50) Fund Family Rating 51) Morningstar’s Forgotten <p><u>Rolling Averages</u></p> <ol style="list-style-type: none"> 52) APR min Thresholds <p><u>Portfolio Characteristics</u></p> <ol style="list-style-type: none"> 53) Portfolio Turnover 54) Enhanced Strategy 55) Cash Allocation 56) Equity Allocation 57) Bond Allocation 58) No. of Holdings 59) Avg Market Cap of Equity Holdings 60) Avg Price/Earnings (P/E) of Equity Holdings 61) Avg Price/Book (P/B) of Equity Holdings 62) Avg Duration of Bond Holdings 63) Avg Quality of Bond Holdings 64) Managed Volatility <p><u>Purchase Info</u></p> <ol style="list-style-type: none"> 65) Open/Closed 66) Min Initial Purchase 67) Expense Ratio (ER) 68) 12b-1 Fee, Actual 69) Max Front Load 70) Max Redemption Fee
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