

MFO Premium

MultiSearch Screening Parameters



<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) Age7) Oldest Share Class (OSC)8) Assets Under Management (AUM) Min, Max9) AUM Position (In Category & Of All Rated Funds)10) Index11) Socially Conscious12) ETF12) Manager Tenure13) 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 Funds19) Yield <p><u>Period Metrics & Ratings</u></p> <ol style="list-style-type: none">20) Display Period21) MFO Risk (Up To 4)22) MFO Rating & Rank23) Max Volatility24) Annualized Percent Return (APR) Rating, Rank & Value25) Excess Return26) Max Drawdown (MAXDD) Rating & Value27) Recovery Time Rating & Value28) Standard Deviation (STDEV) Rating & Value29) Downside Deviation (DSDEV) Rating & Value30) Ulcer Index Rating & Value31) Bear Rating32) Sharpe Ratio Rating & Value33) Sortino Ratio Rating & Value34) Martin Ratio <p><u>Capture Metrics</u></p> <ol style="list-style-type: none">35) Upside Capture36) Downside Capture37) Capture Ratio	<p><u>Correlation 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 Rating43) Composite Sharpe Ratio44) Composite APR <p><u>MFO Designations</u></p> <ol style="list-style-type: none">45) Great Owl46) Fund Alarm47) Profiled Funds ("David's Take")48) Pre-Set Screens49) Fund Family (Up To 5)50) Fund Family Rating51) 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 Turnover54) Enhanced Strategy55) Cash Allocation56) Equity Allocation57) Bond Allocation58) No. of Holdings59) Avg Market Cap of Equity Holdings60) Avg Price/Earnings (P/E) of Equity Holdings61) Avg Price/Book (P/B) of Equity Holdings62) Avg Duration of Bond Holdings63) Avg Quality of Bond Holdings64) Managed Volatility <p><u>Purchase Info</u></p> <ol style="list-style-type: none">65) Open/Closed66) Min Initial Purchase67) Expense Ratio (ER)68) 12b-1 Fee, Actual69) Max Front Load70) Max Redemption Fee
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