

<p>Basic Info</p> <p>1) Asset Universe (Up To 5)</p> <p>2) SubType (Up To 9)</p> <p>3) Symbols (Up To 100)*</p> <p>4) Age</p> <p>5) Index Fund?</p> <p>6) Names (Up To 10)*</p> <p>More Basic Info</p> <p>7) Type (Up To 4)</p> <p>8) Objective (Up To 25)</p> <p>9) All Share Class?</p> <p>10) Share Class (Up To 5)</p> <p>11) ETFs?</p> <p>12) Smart Beta ETFs</p> <p>13) Best-Fit Benchmarks (Up To 5)</p> <p>14) ETF Benchmarks (Up To 5)</p> <p>15) Include Benchmark?</p> <p>16) Include Averages?</p> <p>17) Socially Conscious?*</p> <p>18) ESG Score (Up To 5)</p> <p>19) Fund of Funds?</p> <p>20) Management Approach</p> <p>21) Interval Funds?</p> <p>22) Include Best-Fit BMs?</p> <p>23) Include ETF BMs?</p> <p>24) Include Price-Based Metrics?</p> <p>25) Benchmark (Up To 5)</p> <p>Categories</p> <p>26) U. S. Equity (Up To 9)</p> <p>27) International Equity (Up To 9)</p> <p>28) Global Equity (Up To 9)</p> <p>29) Sector Equity (Up To 9)</p> <p>30) Commodity (Up To 4)</p> <p>31) Index (Up To 7)</p> <p>32) Bond (Up To 9)</p> <p>33) Mixed Asset (Up To 9)</p> <p>34) Alternative (Up To 7)</p> <p>35) Trading (Up To 2)</p> <p>36) Municipal Bond (Up To 9)</p> <p>37) Money Market (Up To 7)</p> <p>38) Index (Up To 7)</p> <p>39) Exclude Equity (Up To 25)</p> <p>40) Exclude Mixed Asset and alternative (Up To 15)</p> <p>41) Exclude Commodity and Trading Market (Up To 10)</p> <p>42) Exclude Bond and Money Market (Up To 20)</p> <p>Risk & Return Metrics</p> <p>43) MFO Risk (Up To 4)</p> <p>44) Max Drawdown (MAXDD)</p> <p>45) MAXDD Rating</p> <p>46) Standard Deviation (STDEV)</p> <p>47) Sharpe Ratio</p> <p>48) Sharpe Rating</p> <p>49) STDEV Rating</p> <p>50) MFO Rating</p> <p>51) Return</p> <p>52) Return Rating</p> <p>53) APR vs BF BM</p> <p>54) APRBF Rating</p> <p>55) APR vs ETF BM</p> <p>56) APRBE Rating</p> <p>More Risk Metrics</p> <p>57) Downside Deviation (DSDDEV)</p> <p>58) DSDDEV Rating</p> <p>59) Bear Market Dev (BMDEV)</p> <p>60) BMDEV Rating</p> <p>61) Down Market Dev (DMDEV)</p> <p>62) DMDEV Rating</p> <p>63) Up Market Dev (UMDEV)</p> <p>64) UMDEV Rating</p> <p>65) Current Drawdown (CDD)</p> <p>66) Ulcer Index</p> <p>67) Ulcer Rating</p> <p>68) Recovery Time</p> <p>69) Recovery Rating</p> <p>70) Three Alarm Risk</p> <p>71) Three Alarm Risk Rating</p> <p>72) Max Volatility</p> <p>73) Worst Calendar Year MAXDD</p> <p>More Return Metrics</p> <p>74) Sortino Ratio</p> <p>75) Sortino Rating</p> <p>76) Martin Ratio</p> <p>77) Worst Calendar Year Return</p> <p>78) Reamer Ratio</p> <p>79) Reamer Rating</p> <p>80) Excess Return</p> <p>81) APR vs Peer</p> <p>82) Batting Average</p> <p>83) Batting Average vs BF BM</p> <p>84) BABF Rating</p> <p>Rankings</p> <p>95) MFO Rank Position</p> <p>96) MFO Rank Percent</p> <p>97) APR Rank Position</p> <p>98) APR Rank Percent</p> <p>Display Period</p> <p>99) Life (8)</p> <p>100) Unique (26)</p> <p>101) Heavily (13)</p> <p>102) Monthly (11)</p> <p>103) Decadal (9)</p> <p>104) Calendar Year (16)</p> <p>105) Full Cycle (10)</p> <p>106) Bear Market (10)</p> <p>107) Bull Market (10)</p> <p>108) Calendar Decade (11)</p> <p>Pre-Set Screens</p> <p>109) Allocation (4)</p> <p>110) Benchmarks & Reference (6)</p> <p>111) Model (2)</p> <p>112) Sector (6)</p> <p>113) Largest (11)</p> <p>114) Unique (5)</p> <p>MFO Designations</p> <p>115) Great Owl Funds?</p> <p>116) Fund Alarm Rating</p> <p>117) Enhanced Strategy?</p> <p>118) Profiled Funds?</p> <p>Multi-Year Ratings (1, 3, 5, 10, 20 yr, Comp)</p> <p>119) MFO Risk</p> <p>120) APR Rating</p> <p>121) Sharpe Rating</p> <p>122) MFO Rating</p> <p>Multi-Period Ratings (Bear & Bull for CV-19, GFC, DCB)</p> <p>123) APR Rating</p> <p>124) APRBF Rating</p> <p>125) APRBE Rating</p> <p>Lipper Leaders (1, 3, 5, 10 yr, Overall)</p> <p>126) Total Return</p> <p>127) Consistent Return</p> <p>128) Preservation</p> <p>129) Expense</p> <p>130) Tax Efficiency</p> <p>Capture Metrics (vs SP500, USBond, US6000, ACHUS)</p> <p>131) Capture Ratio</p> <p>132) Capture Rating</p> <p>133) Upside Capture Ratio</p> <p>134) Upside Capture Rating</p> <p>135) Downside Capture Ratio</p> <p>136) Downside Capture Rating</p> <p>Correlation Metrics (vs Peer, BM, SP500, USBonds, ACHUS)</p> <p>137) Correlation R</p> <p>138) R-squared</p> <p>Alpha Beta Metrics</p> <p>139) Alpha</p> <p>140) Alpha Rating</p> <p>141) Information Ratio</p> <p>142) Information Rating</p> <p>143) Beta vs SP500</p> <p>144) Beta vs Best-Fit BM</p> <p>145) Tracking Error (TEDEV)</p> <p>146) TEDEV Rating</p>	<p>Ferguson Metrics (1, 3, 5, 10 yr, Life)</p> <p>147) Outperformance Measure (FOM)</p> <p>148) FOM Rating</p> <p>149) Consistency Index (FCI)</p> <p>150) FCI Rating</p> <p>151) Mean Ratio (FMR)</p> <p>152) FMR Rating</p> <p>Trend Metrics (1, 10 mo)</p> <p>153) Simple Moving Avg (SMA)</p> <p>154) SMA Rating</p> <p>155) Exponential Moving Avg (EMA)</p> <p>156) EMA Rating</p> <p>157) Trend vs SMA</p> <p>158) Trend vs SMA Rating</p> <p>159) Trend vs EMA</p> <p>160) Trend vs EMA Rating</p> <p>Momentum (1, 3, 5, 9, 12 mo)</p> <p>161) MoM</p> <p>162) MoM Rating</p> <p>Rolling Averages (1, 3, 5, 10, 20 yr)</p> <p>163) APR Avg Rating</p> <p>164) APR Avg Threshold</p> <p>165) APR Min Threshold</p> <p>166) Rolling Batting Average</p> <p>167) Rolling Batting Average Rating</p> <p>Management Info</p> <p>168) Manager Names (Up To 5)*</p> <p>169) Manager Tenure</p> <p>170) Management City (Up To 5)</p> <p>171) Adviser Names (Up To 5)*</p> <p>172) SubAdviser (Up To 5)</p> <p>173) Management State (Up To 5)</p> <p>Family Metrics</p> <p>174) Fund Family (Up To 10)</p> <p>175) Fund Subfamily (Up To 5)</p> <p>176) Fund Family Rating (Up To 4)</p> <p>177) Fund Family AUM (Min, Max)</p> <p>Purchase Info</p> <p>178) Expense Ratio (ER)</p> <p>179) ER Rating</p> <p>180) Open or Closed?</p> <p>181) 12b-1 Fee?</p> <p>182) Net Management Fee</p> <p>183) Min Initial Purchase</p> <p>184) Front Load?</p> <p>185) Redemption Fee?</p> <p>186) Net Acquired Fee</p> <p>Taxes (1, 3, 5, 10 yr)</p> <p>189) Tax Cost Ratio (TCR) Pre-Liquidation</p> <p>190) TCR Pre Rating</p> <p>191) Tax Cost Ratio (TCR) Post-Liquidation</p> <p>192) TCR Post Rating</p> <p>193) Return After Tax (RAT) Pre-Liquidation</p> <p>194) RAT Pre Rating</p> <p>195) Return After Tax (RAT) Post-Liquidation</p> <p>196) RAT Post Rating</p> <p>AUM Info</p> <p>197) Assets Under Mgmt (AUM Min, MAX)</p> <p>198) AUM Rank (In Category)</p> <p>199) AUM Rank (All Rated Funds)</p> <p>Portfolio Info</p> <p>200) Yield</p> <p>201) Yield Rating</p> <p>202) Dividend Frequency</p> <p>203) Cash Allocation</p> <p>204) Bond Allocation</p> <p>205) Equity Allocation</p> <p>206) Number of Holdings</p> <p>207) Concentration (Top 10 Holdings)</p> <p>208) Dividend Payout</p> <p>209) Div Payout Rating</p> <p>210) Market Cap (Min, Max)</p> <p>211) Turnover</p> <p>212) Managed Volatility?</p> <p>Equity Info</p> <p>213) Price/Earnings (PE)</p> <p>214) P/E Rating</p> <p>215) Price/Sales (PS)</p> <p>216) P/S Rating</p> <p>217) Debt/Equity (D/E)</p> <p>218) D/E Rating</p> <p>219) Return on Assets (ROA)</p> <p>220) ROA Rating</p> <p>221) Return on Equity (ROE)</p> <p>222) ROE Rating</p> <p>223) Operating Cash Growth</p> <p>224) Op Cash Growth Rating</p> <p>225) Sales Growth</p> <p>226) Sales Growth Rating</p> <p>227) Price/Book (P/B)</p> <p>228) P/B Rating</p> <p>229) Price/Cash (P/C)</p> <p>230) P/C Rating</p> <p>231) Return on Capital (ROC)</p> <p>232) ROC Rating</p> <p>233) Return on Investment (ROI)</p> <p>234) ROI Rating</p> <p>235) Earnings per Share (EPS) Growth</p> <p>236) EPS Growth Rating</p> <p>237) Sales/Share (SPS) Growth</p> <p>238) SPS Growth Rating</p> <p>239) Dividend Growth</p> <p>240) Div Growth Rating</p> <p>Bond Info</p> <p>241) Bond Quality</p> <p>242) Junk</p> <p>243) Junk Plus Non-Rated</p> <p>244) Duration</p> <p>245) Duration Rating</p> <p>246) Nominal Maturity</p> <p>247) Effective Maturity</p> <p>248) Effective Maturity Rating</p> <p>249) Nominal Maturity Rating</p> <p>250) Yield To Maturity</p> <p>251) Yield To Maturity Rating</p> <p>252) Average Coupon</p> <p>253) Average Coupon Rating</p> <p>Ten Top Holdings</p> <p>254) Name (Up To 5)</p> <p>255) Type (Up To 9)</p> <p>256) Country (Up To 5)</p> <p>257) Currency (Up To 9)</p> <p>258) Ticker or CLSIP (Up To 5)</p> <p>259) Sector (Up To 5)</p> <p>260) Debt (Up To 5)</p> <p>Sector Allocation</p> <p>261) Basic Materials</p> <p>262) Industrials</p> <p>263) Consumer Goods</p> <p>264) Oil & Gas</p> <p>265) Consumer Services</p> <p>266) Technology</p> <p>267) Financials</p> <p>268) Telecommunications</p> <p>269) Health Care</p> <p>270) Utilities</p> <p>271) Security</p> <p>272) Sector</p> <p>273) Country</p> <p>274) Currency</p> <p>275) Debt</p> <p>Watchlists</p> <p>276) 25 Available, Stored in User Profile (Up to 100 Tickers Each)</p> <p>Searches</p> <p>277) 25 Available, Stored in User Profile</p> <p>Preferences</p> <p>278) 10 Available, Stored in User Profile</p>
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