

# SmartMoney.com's Mutual Fund Screener

Based on the interface of our popular Stock Screener tool, we have created the Fund Screener which gives users the ability to compare mutual funds on a wide variety of criteria. With this new in-depth mutual fund analysis tool, users can conduct a thorough search of over 14,000 different funds. Users have various search capabilities which include over 60 different screening criteria as well as multiple pre-defined SmartMoney screens. Licenceses can also populate the screener with their own screens.

## HOW IT WORKS

This customizable fund research tool helps users find the funds that meet their requirements. From funds with the lowest turnover rate to those with the highest return in their category, users can create any screen, view the results, and further compare selected funds. The screener can be easily customized in terms of look and feel as well as functionality.

**Create a custom search:** Screen our database of more than 14,000 mutual funds using over 60 different financial and valuation benchmarks. Compare a chosen criteria with specific values, ticker symbols or to another set of criteria.

**Select a SmartMoney Screen:** Utilize pre-set screens to receive SmartMoney's perspective on the latest categories of funds including Balanced Funds, Mid-Cap Value, Real Estate Funds and many more.

**Help at Your Fingertips:** For each variable users are given descriptive category averages and editor's comments.

## KEY FEATURES AND BENEFITS

- Tap into a database of more than 14,000 Funds
- Choose from 60 different screening criteria, including performance, risk, and ratings
- View your results in three innovative ways: table, histogram and thumbnails
- Get extensive help text on how to screen and how to interpret each criteria
- Save your favorite screens for repeated use
- Try SmartMoney's pre-set screens
- Create a spreadsheet and download an extensive report on all of your screens or export the results to any other application, such as a watchlist

1 Variables to screen on	2 Conditions	3 Values	Averages	Description
Standard Deviation	Bottom % in Category	50.0		<b>Minimum Initial Investment</b> Definition: The minimum amount required to make your first investment in a mutual fund. Comments: If you plan to invest in a specific fund, you'll need to know this information. While many retail funds have initial investment requirements ranging from
Open to New Investors	=	Y		
Minimum Initial Investment	<=	5000		
Choose field	Choose operator			

You have defined 3 conditions.  
Click on the next row or the 'Find Funds' button to add more.

include missing (n/a) values

**4** → Finish **Find Funds**

Total results: 19

**Make report** [For more on SmartMoney's Core Funds screen, click here.](#)

1-yr price chart	table	histogram	thumbnails	help			
Ticker	Name	Category	Annualized 5-year (%)	1-year Load Fund Return (%) (yes/no)	Manager's Tenure	Net Assets (\$ millions)	Standard Deviation
DGAGX	Dreyfus Appreciation	Large Blend	2.47	-14.70 N	12	3,134.03	12.7
STFGX	State Farm Growth	Large Blend	1.10	-18.71 N	15	2,811.69	14.4
FGRFX	Fidelity Growth & Income	Large Blend	1.96	-15.96 N	10	27,908.14	11.8
SWHGX	Schwab MarketTrack Growth	Large Blend	0.62	-15.70 N	7	537.68	12.9
PREIX	T. Rowe Price Equity Inds.	Large Blend	-0.01	-21.54 N	12	3,010.44	15.7
PDPIX	Prudential Stock Index I	Large Blend	0.08	-21.54 N	5	1,088.17	15.6
NIEX	Eclipse Indexed Equity	Large Blend	0.15	-21.49 N	4	850.47	15.7
GESSX	General Elects. S&P Progr.	Large Blend	2.81	-17.68 N	12	3,870.27	14.3
ILCX	Galaxy II Large Company	Large Blend	0.03	-21.30 N	4	660.36	15.6
HDX	Harris Insight Index Instl	Large Blend	-0.03	-21.45 N	3	323.89	15.6

Fund Family	Display only	Fund Family
Choose field	Choose operator	Definition: Fund Family

You have defined 1 condition.  
Click on the next row or the 'Find Funds' button to add more.

include missing (n/a) values

**Find Funds**

Total results: 13221

**Make report** [For more on SmartMoney's latest screen, click here.](#)

**Dreyfus Premier**

**Morgan Stanley Funds**

**IDEX Mutual Funds**

**POPIX** - Dreyfus Premier Worldwide Growth A  
Median Market Cap: 102710.04  
Sector: Dreyfus Premier  
(click for details)

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