

BEST MUTUAL FUNDS AWARDS

Best U.S. Diversified Mutual Funds

BY IBD STAFF



This list highlights the best U.S. diversified mutual funds to consider now, based on each fund outperforming the S&P 500 over the last one-, three-, five- and 10-year periods. Of 1,286 U.S. diversified stock funds at least 10 years old, 318 of them, or 25%, won awards.

| Best U.S. Diversified Mutual Funds | | | | | | | |
|---|--------|---------------------|--------------------------|--------------------------|---------------------------|----------------------|-------------------|
| Mutual funds | Symbol | 1-year total return | 3-year avg annual return | 5-year avg annual return | 10-year avg annual return | Morningstar category | Closed to new inv |
| <i>Benchmark: S&P 500</i> | | 18.40% | 14.18% | 15.22% | 13.88% | | |
| Value Line Larger Companies Focused Inv | VALLX | 45.98 | 22.95 | 20.04 | 16.44 | Large Growth | No |
| Value Line Mid Cap Focused | VLIFX | 19.96 | 19.34 | 17.71 | 14.81 | Mid-Cap Growth | No |
| Value Line Small Cap Opportunities Inv | VLEOX | 26.60 | 14.71 | 15.22 | 14.18 | Small Growth | No |
| Value Line Select Growth Fund | VALSX | 23.12 | 19.47 | 17.42 | 14.05 | Mid-Cap Growth | No |

VALLX Gross / Net Expense Ratio : 1.16% / 1.15% VLIFX Gross / Net Expense Ratio: 1.11% VLEOX Gross / Net Expense Ratio: 1.19% VALSX Gross / Net Expense Ratio: 1.16%

The fund's standardized average annual total returns, current to the most recent calendar quarter ended can be found at this link <https://vlfunds.com/funds/equity>

Note: Data on the funds above is excerpted from the complete list of award-winning IBD Best Mutual Funds at Investors.com.

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