

FINDING A FUND: WHERE TO START

1

THE AAI MUTUAL FUND GUIDE

The mutual fund guide is updated monthly

Covers more than 24,000 mutual funds

Includes performance tables, commentary, expanded fund listings, etc.

Link: www.aai.com/guides/article/15951-guide-to-top-mutual-funds-2022

2

THE AAI ETF GUIDE

The ETF guide is updated monthly

Covers all U.S. listed ETFs and ETNs (exchange traded notes)

Includes performance tables, commentary, expanded fund listings, etc.

Link: www.aai.com/guides/article/15952-guide-to-top-etfs-2022

3

AAI INVESTING IDEAS

Lists top and bottom performing funds

Funds that have consistently outperformed their peers

Featured ETF and mutual fund "first cuts", performance benchmarks, etc.

Link: www.aai.com/investingideas

4

MUTUAL FUND AND ETF EVALUATORS

Quickly analyze any fund with either evaluator tool

To use, type in the fund ticker in the search bar on the AAI website

Access any fund's portfolio stats, composition, allocation, risk measures, etc.

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FUNDS+ SCREENER

Both A+ Investor and AAI Platinum subscribers can access
Find and browse mutual funds that meet your investment criteria
Conveniently load predefined screens or choose your own filters
Link: www.aaii.com/funds/screener

2

ETF+ SCREENER

Both A+ Investor and AAI Platinum subscribers can access
Find and browse ETFs that meet your investment criteria
Conveniently load predefined screens or choose your own filters
Link: www.aaii.com/etfs/screener

3

COMPARISON FUNDS TOOL

Do a side-by-side comparison of two or more mutual funds and/or ETFs
Compare funds by their category, return, risk, turnover, expense ratio, etc.
View their overall grade (A-F) to see how they compare
Link: www.aaii.com/funds/compare

4

FUND OPENINGS AND CLOSINGS

View lists of funds that have closed or reopened over the past month
To use, type in the fund ticker in the search bar on the AAI website
Conveniently keep track of fund activities that you'll need to be aware of
Link: www.aaii.com/funds/openclose