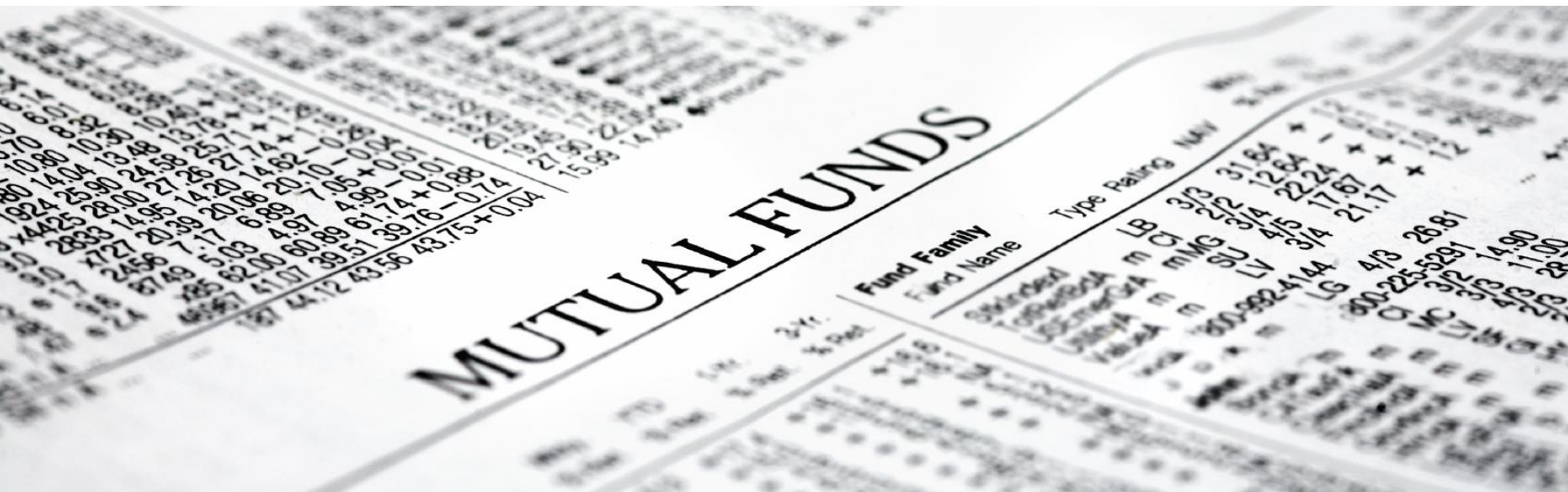


2014 GOLD MEDAL WINNERS



MUTUAL FUNDS

About Us

Corporate Insight provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, the firm has tracked technological developments in the financial services industry, identifying best practices in online banking and investing, online insurance, mobile finance, active trading platforms, social media and other emerging areas. There are no assumptions in Corporate Insight's work – we use live accounts at all of the firms we track, providing our clients with unparalleled, unbiased competitive intelligence.

Press Coverage

WALL STREET JOURNAL

REUTERS

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The New York Times

InvestmentNews

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TIME

Promote Your Firm's 2014 Gold Medals!

Corporate Insight is happy to assist all gold medal winning firms in promoting their honors. For more information and to see examples of past promotions, contact us at PR@Corporateinsight.com.

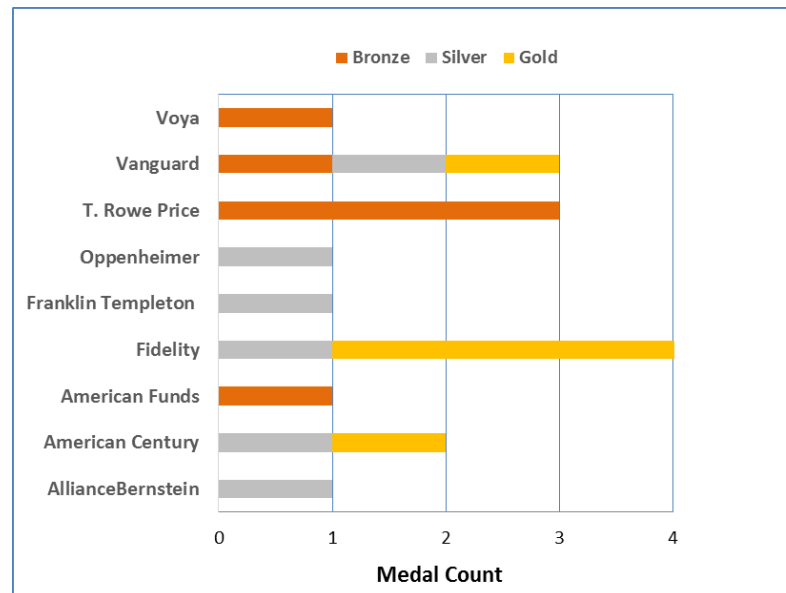
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Mutual Fund Monitor Awards

Corporate Insight is pleased to present our fourteenth annual Monitor Awards report, offering a broad benchmarking of the asset management industry across several key sectors. This year, we award firms in six crucial categories: Public Homepage, Investor Performance Reporting, Retirement Centers, Product Pages, Fund Screeners and Educational Resources. Within each category, we award Monitor Awards in gold, silver and bronze based on how well firms meet our criteria.

To review, the **Gold Medal** is reserved for offerings that provide an exceptionally valuable service. For features that offer similar value, but lack some of the outstanding attributes and functions of the best offerings, we award a **Silver Medal**. For features that offer an excellent or unique service, but do not meet the highest standards for a given category, we award a **Bronze Medal**.



Category Overview

- Public Homepage
- Investor Performance Reporting
- Retirement Centers
- Product Pages
- Fund Screeners
- Educational Resources



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Public Homepage

A website's public homepage is like a virtual store front window from which initial impressions are often made. Factors such as usability and aesthetics play a large role in where the investors are going to navigate. It is essential that a public homepage deliver access to key site features and highlight promotions while maintaining an appealing appearance and learnable functionality.



American Century receives a gold medal for the fourth year in a row for its public homepage design. The firm has maintained its appealing homepage that tactfully presents promotions of funds and services. The standout feature in the homepage is the eye-catching image carousel, which is updated seasonally and is comprised of four thematically-related images that link to different site areas.

Investor Performance Reporting

Account performance analysis is an important way for firms to help clients assess personal growth, and make informed decisions about planning for the future. Here, we examine how fund firms display and dissect performance data for their clients. We focus on the accessibility of portfolio performance data, as well as content and presentation values.



Vanguard receives the gold medal for its consistent dedication to rolling out site enhancements that improve the investor experience, particularly in online performance reporting. Throughout the year, incremental changes have occurred in various sections of the site, including the Balances Over Time and Performance pages of the private site My Accounts tab, which continue to offer comprehensive performance data. Users can now also view available performance data from the past 10 years. Direct accessibility is given through the private account overview page, which includes mini Balances Over Time and Personal Performance mountain charts.



Retirement Resources

Retirement centers are crucial for investors seeking educational resources and information on retirement investment planning. Common resources include relevant commentary and articles on life-stage investing strategies, as well as promotions for retirement-related products, services and tools. Our evaluation sought to find clearly-organized retirement modules that successfully endorse the firms' retirement products and resources.

For the fourth year in a row, **Fidelity** has earned the gold medal for delivering exceptional retirement resources through the firm's Research, Guidance & Retirement and Investment Products tabs. Fidelity continues to be a leader in providing a wide variety of clear and actionable retirement planning information, which includes a generous selection of useful tools and calculators, worksheets, checklists, videos and frequently updated commentary. Relevant products and services are promoted seamlessly throughout the content, and all information in the Retirement Planning section is conveniently segmented by life stages, while the Investment Products tab educates investors on the intricacies of IRAs and 401(k) plans.





Product Pages

Fund profile pages are a critical outlet for communicating a product's key selling points, including expenses and fees, performance data and portfolio composition. Ideally, investors should be able to find all information that may influence their purchase of a fund within the profile page itself. Therefore, firms should be sure that their fund profiles are well-organized, detailed and relatable to investors' needs.



Fidelity receives a gold medal for its fund profiles, which are characterized by their balance between the volume of information on display and the clarity, organization and intuitive detail of that data. The firm's product pages are relatively unchanged since last year's Awards Report, in which they received a silver medal, but our experience with them in the ensuing report gave us a renewed appreciation for their features and design. The firm's fund profiles offer a clear presentation of detailed information, as well as excellent value-added features that include interactive charts and a comparison tool.

Fund Screeners

Fund screeners are an important research tool for curious investors, allowing them to conduct a focused fund search as specific or broad as they wish. In order to qualify, tools must include editable search criteria, as opposed to an initial master list of all funds that can be whittled down with filters. Screeners are common among firms in our coverage group, but a few leaders stand out with excellent, highly-detailed tools.



Fidelity's fund screener is still the best in our coverage group, merging an effective variety and complexity of screener fields with a simple, dynamic and user-friendly interface. The tool is readily accessible in the public site's Research tab, and centralizes all input fields into a single, compact interface. Input criteria are relatively simple, but highly focused. Users can specify a desired Morningstar rating, returns and expenses (both ranging from low to high); they can check a box indicating whether to include only Fidelity funds or funds with no transaction fee. As the search criteria become more specific, the tally of matching funds refreshes in real time.



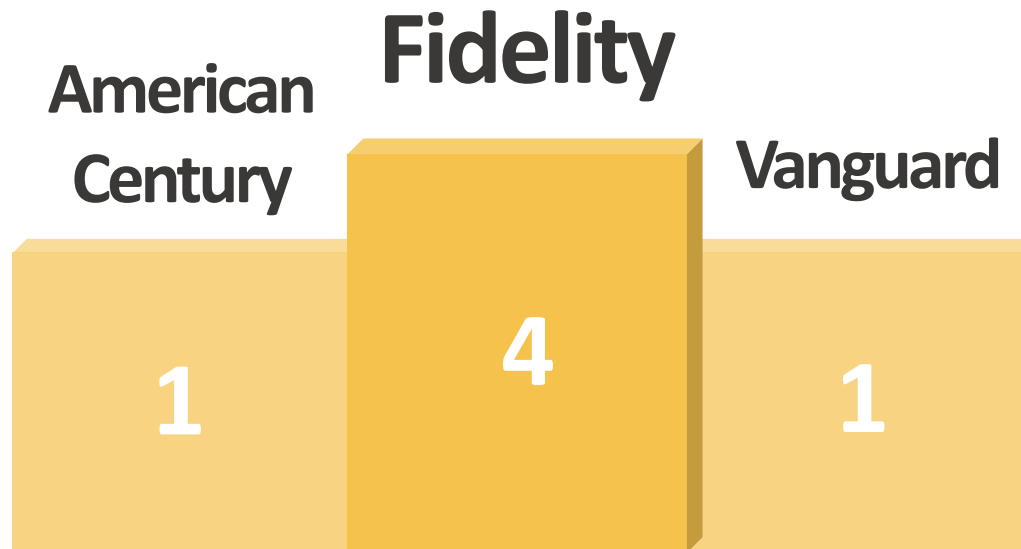
Educational Resources

Financial literacy is an important asset for any successful investor, so fund firms should provide the right tools, educational materials and resources that help their clients improve their skills. Here we examine the breadth and depth of the educational resources provided by our coverage firms, seeking to identify leaders in content, organization and accessibility.



Fidelity offers a highly interactive and personal suite of educational materials in its winning public site Learning Center. The section focuses on organizing and delivering hundreds of educational pieces that cater to investors of all stripes, although the section also highlights new or notable commentaries and events that may be of educational interest to particular investors. The Learning Center accommodates dozens of diverse topic categories – Mutual Funds, Options Strategies, Investing in Retirement and Fundamental Analysis, to name a few – that span a wide swath of the personal finance and investing landscape.

2014 Top Gold Medal Winners



The 2014 Mutual Fund Monitor Award concludes with Fidelity leading with four gold medals leaving American Century and Vanguard each with one gold medal.

Contact Us

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