



Basic Info 1) Asset Universe (Up To 5) 2) SubType (Up To 9) 3) Symbols (Up To 100)* 4) Age 5) Index Fund? 6) Names (Up To 10)* More Basic Info 7) Type (Up To 4) 8) Objective (Up To 25) 9) All Share Class? 10) Share Class (Up To 5) 11) ETFs? 12) Smart Beta ETFs 13) Best-Fit Benchmark (Up To 5) 14) ETF Benchmark (Up To 5) 15) Socially Conscious?* 16) ESC Score (Up To 5) 17) Fund of Funds? 18) Management Approach 19) Interval Funds? 20) Include Averages? 21) Include Best-Fit BMs? 22) Include ETF BMs? 23) Include Price-Based Metrics? Categories 24) U. S. Equity (Up To 9) 25) Global Equity (Up To 9) 26) International Equity (Up To 9) 27) Sector Equity (Up To 9) 28) World Sector Equity (Up To 4) 29) Allocation (Up To 5) 30) Mixed Asset (Up To 3) 31) Target Date (Up To 7) 32) Index (Up To 7) 33) Exclude Equity (Up To 25) 34) Exclude Mixed Asset and Alternative (Up To 15) 35) Bond (Up To 9) 36) Government Bond (Up To 5) 37) World Bond (Up To 5) 38) Municipal Bond (Up To 9) 39) State Bond (Up To 7) 40) Alternative (Up To 7) 41) Options & Trading (Up To 2) 42) Commodity (Up To 4) 43) Money Market (Up To 7) 44) Index (Up To 7) 45) Exclude Commodity, Options & Trading (Up To 10) 46) Exclude Bond and Money Market (Up To 20) Risk & Return Metrics 47) MFO Risk (Up To 4) 48) Max Drawdown (MAXDD) 49) MAXDD Rating 50) Standard Deviation (STDEV) 51) STDEV Rating 52) Sharpe Ratio 53) Sharpe Rating 54) MFO Rating 55) Return 56) Return Rating 57) APR vs BF BM (APRBF) 58) APRBF Rating 59) APR vs ETF BM (APRBE) 60) APRBE Rating More Risk Metrics 61) Downside Deviation (DSDEV) 62) DSDEV Rating 63) Bear Market Dev (BMDEV) 64) BMDEV Rating 65) Down Market Dev (DMDEV) 66) DMDEV Rating 67) Up Market Dev (UMDEV) 68) UMDEV Rating 69) Current Drawdown (CDD) 70) Ulcer Index 71) Ulcer Rating 72) Recovery Time 73) Recovery Rating 74) Three Alarm Risk 75) Three Alarm Risk Rating 76) Max Volatility 77) Worst Calendar Year MAXDD More Return Metrics 78) Calmar Ratio 79) Calmar Rating 80) Sortino Ratio 81) Sortino Rating 87) Reamer Ratio 88) Reamer Rating 89) Martin Ratio 90) Average Calendar Year APR 91) Excess Return 92) Real Return 93) Batting Average (BA) 94) BA Rating 95) Batting Average vs BF BM (BABF) 96) BABF Rating 97) Worst Calendar Year APR 98) Best Calendar Year APR 99) APR vs Peer Rankings 100) MFO Rank Position 101) MFO Rank Percent 102) APR Rank Position 103) APR Rank Percent Display Period 104) Life (8) 105) Unique (39) 106) Yearly (35) 107) Monthly (11) 108) Decadal (9) 109) Calendar Year (18) 110) Full Cycle (10) 111) Bear Market (10) 112) Bull Market (10) 113) Calendar Decade (11) Pre-Set Screens 114) Allocation (4) 115) Benchmarks & Reference (6) 116) Model (2) 117) Sector(7) 118) Largest (20) 119) Unique (5) MFO Designations 115) Great Owl Funds? 116) Enhanced Strategy? 117) Fund Alarm Rating 118) Profiled Funds? Multi-Year Ratings [1, 3, 5, 10, 20 yr, Comp] 119) MFO Risk 120) APR Rating 121) Sharpe Rating 122) MFO Rating Multi-Period Ratings [Bear & Bull for CV-19, GFC, DCB] 123) APR Rating 124) APRBF Rating 125) APRBE Rating Lipper Leaders [3, 5, 10 yr, Overall] 126) Total Return 127) Consistent Return 128) Preservation 129) Expense 130) Tax Efficiency Capture Metrics [vs SP500, USBond, US6040, ACIxUS] 131) Capture Ratio 132) Capture Rating 133) Upside Capture Ratio 134) Upside Capture Rating 135) Downside Capture Ratio 136) Downside Capture Rating Correlation Metrics [vs Peer, BM, SP500, USBond, ACIxUS] 137) Correlation R 138) R-squared Alpha Beta Metrics 139) Alpha 140) Alpha Rating 141) Information Ratio 142) Information Rating 143) Beta vs SP500 144) Beta vs Best-Fit BM 145) Tracking Error (TEDEV) 146) TEDEV Rating Ferguson Metrics [3, 5, 10 yr, Life] 147) Outperformance Measure (FOM) 148) FOM Rating 149) Consistency Index (FCI) 150) FCI Rating 151) Mega Ratio (FMR) 152) FMR Rating Trend Metrics [3, 10 mo] 153) Simple Moving Avg (SMA) 154) SMA Rating 155) Exponential Moving Avg (EMA) 156) EMA Rating 157) Trend vs SMA 158) Trend vs SMA Rating 159) Trend vs EMA 160) Trend vs EMA Rating Momentum [3, 6, 9, 12 mo] 161) MoM 162) MoM Rating Rolling Averages [1, 3, 5, 10, 20 yr] 163) APR Avg Ratings 164) APR Avg Thresholds 165) APR Min Thresholds 166) Rolling Batting Averages 167) Rolling Batting Average Ratings Management Info 168) Manager Names (Up To 5)* 169) Manager Tenure 170) Management City (Up To 5) 171) Adviser Names (Up To 5)* 172) SubAdviser (Up To 5) 173) Management State (Up To 5) Family Metrics 174) Fund Family (Up To 10) 175) Fund SubFamily (Up To 5) 176) Fund Family Rating (Up To 4) 177) Fund Family AUM (Min, Max) Purchase Info 178) Expense Ratio (ER) 179) ER Rating 180) Open or Closed? 181) 12b-1 Fee? 182) Net Management Fee 183) Min Initial Purchase 184) Front Load? 185) Redemption Fee? 186) Net Acquired Fee Taxes [1, 3, 5, 10 yr] 189) Tax Cost Ratio (TCR) Pre-Liquidation 190) TCR Pre Rating 191) Tax Cost Ratio (TCR) Post-Liquidation 192) TCR Post Rating 193) Return After Tax (RAT) Pre-Liquidation 194) RAT Pre Rating 195) Return After Tax (RAT) Post-Liquidation 196) RAT Post Rating AUM Info 197) Assets Under Mgmt (AUM Min, MAX) 198) AUM Rank (In Category) 199) AUM Rank (All Rated Funds) Portfolio Info 200) Yield 201) Yield Rating 202) Dividend Frequency 203) Cash Allocation 204) Bond Allocation 205) Equity Allocation 206) Number of Holdings 207) Concentration (Top 10 Holdings) 208) Dividend Payout 209) Div Payout Rating 210) Market Cap (Min, Max) 211) Turnover 212) Managed Volatility? Equity Info 213) Price/Earnings (P/E) 214) P/E Rating 215) Price/Sales (P/S) 216) P/S Rating 217) Debt/Equity (D/E) 218) D/E Rating 219) Return on Assets (ROA) 220) ROA Rating 221) Return on Equity (ROE) 222) ROE Rating 223) Operating Cash Growth 224) Op Cash Growth Rating 225) Sales Growth 226) Sales Growth Rating 227) Price/Book (P/B) 228) P/B Rating 229) Price/Cash (P/C) 230) P/C Rating 231) Return on Capital (ROC) 232) ROC Rating 233) Return on Investment (ROI) 234) ROI Rating 235) Earnings per Share (EPS) Growth 236) EPS Growth Rating 237) Sales/Share (SPS) Growth 238) SPS Growth Rating 239) Dividend Growth 240) Div Growth Rating Bond Info 241) Bond Quality 242) Junk 243) Junk Plus Non-Rated 244) Duration 245) Duration Rating 246) Nominal Maturity 247) Effective Maturity 248) Effective Maturity Rating 249) Nominal Maturity Rating 250) Yield To Maturity 251) Yield To Maturity Rating 252) Average Coupon 253) Average Coupon Rating Ten Top Holdings 254) Name (Up To 5) 255) Type (Up To 9) 256) Country (Up To 5) 257) Currency (Up To 9) 258) Ticker or CUSIP (Up To 5) 259) Sector (Up To 5) 260) Debt (Up To 5) Sector Allocation 261) Basic Materials 262) Industrials 263) Consumer Goods 264) Oil & Gas 265) Consumer Services 266) Technology 267) Financials 268) Telecommunications 269) Health Care 270) Utilities 271) Security 272) Sector 273) Country 274) Currency 275) Debt Watchlists 276) 25 Available, Stored In User Profile (Up to 250 Tickers Each) Searches 277) 25 Available, Stored In User Profile Preferences 278) 10 Available, Stored In User Profile
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* Plus Option: Can Include In Search Independent of Other Criteria