



**Sector Analysis**  
Data courtesy of Morningstar.com

Minimum ROI Criteria:	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
1 Yr	45.0	29.7	59.0	55.4	80.0	17.0	22.0	14.7	84.5	23.8	54.0	31.8	27.4	7.5	98.5	41.2	19.3	23.9	42.5
3 Yr	22.5	22.8	34.7	31.3	40.0	16.0	20.0	13.7	22.1	19.8	47.0	28.9	28.5	6.7	8.6	11.8	31.8	17.5	19.6
5 Yr	19.5	18.1	23.5	27.1	29.0	19.0	17.0	7.8	19.0	17.8	26.0	25.2	33.3	9.4	14.9	11.1	8.5	11.5	29.5
10 Yr	14.7	14.0	19.8	19.2	20.0	16.0	14.0	10.0	13.2	13.9	15.3	14.7	14.1	9.8	12.4	14.0	12.7	15.3	11.8

Class																				Freq		
Blend:																				Sum	Rank	
Large	3	2	11	1									1	1				4		23	6	
Medium			4			1			1	1			1							8	15	
Small			2			2	4		3				2			1		1		15	13	
Growth:																						
Large		1	10	9	1											1	4	1	3	30	3	
Medium	2		3	2	4								2			5				18	11	
Small	3		2		1	2	1		2					2		5			1	19	10	
Specialized:																						
Communications			2	2														1		5	18	
Div. Emerging Mkts.							1	6												27	4	
Emerg. Mkt. Bonds		1					1	6					4	3	6					21	8	
European Stocks							1		1	6	3	3	5	3						22	7	
Foreign Stocks										4						2		1		7	16	
Financial	1	4	10				1													16	12	
Health Care	2		1			1										2		11	4	21	8	
Japanese Stocks											1									1	22	
Latin American Stocks										2	4	2	5	4	3					20	9	
Long Gov't Bonds								2							1					3	20	
Long-Short															1					1	22	
Multi-Sector Bond														1	1					2	21	
Natural Resources		1				1				10	6		10	6						34	2	
Pacific Rim / Asia											3	1	1							5	18	
Precious Metals	2							3	3		6		9	10	10					43	1	
Real Estate									1	6		7	2	1			1	4		22	7	
Technology	2	1		5	8				1				2			4		1	4	1	25	5
Trading – Lev. Eq.																			5	5	18	
Utilities												2					2			4	19	
World Bonds															1					1	22	
Value:																						
Large			2			4														6	17	
Mid-Cap						1														1	22	
Small			1			3			3				1			1		1		10	14	
<b>Total Occurrences</b>	<b>15</b>	<b>10</b>	<b>48</b>	<b>19</b>	<b>14</b>	<b>12</b>	<b>11</b>	<b>11</b>	<b>18</b>	<b>32</b>	<b>29</b>	<b>16</b>	<b>51</b>	<b>37</b>	<b>24</b>	<b>22</b>	<b>5</b>	<b>27</b>	<b>14</b>	<b>415</b>		