



Sector Analysis 1996-2015

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	2015				
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	27.0				
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	22.1				
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	18.7				
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	11.9				
Class																								
Blend:																							Freq	
Large	3	2	11	1									1	1				4		1	24	7	Sum	Rank
Medium			4		1				1	1			1									8		
Small			2		2	4			3				2			1		1				15	14	
Growth:																								
Large		1	10	9	1											1	4	1	3	5	35	3		
Medium	2		3	2	4								2			5				1	19	12		
Small	3		2		1	2	1		2					2		5			1	1	20	11		
Specialized:																								
China Stock																					2	2	21	
Communications			2	2														1				5	18	
Div. Emerging Mkts.									3	3	6	1	6	6	1	1						27	5	
Emerg. Mkt. Bonds		1					1	6					4	3	6							21	10	
European Stocks							1		1	6	3	3	5	3								22	8	
Foreign Stocks										4						2		1				7	16	
Financial	1	4	10				1															16	13	
Health Care	2		1			1										2		11	4	16	37	2		
India Stock																					1	1	22	
Japanese Stocks											1										1	2	21	
Latin American Stocks									2	4	2	5	4	3								20	11	
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	4	
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	9	
Technology	2	1		5	8				1				2			4		1	1	1	26	6		
Trading – Lev. Eq.												2								5	5	10	15	
Utilities																		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	15	
Total Occurrences	15	10	48	19	14	12	11	11	18	32	29	16	51	37	24	22	5	27	14	34	449			