

# Mutual Funds : Funds | Managers - Returns

MAY-16-2023 5:37 PM

## Managers - Returns

Manager Name	Number of Funds	2023 - YTD (avg)	2023 - 1 Yr (avg)	2023 - 3 Yr (avg)	2023 - 5 Yr (avg)	2023 - 10 Yr (avg)
<u>Benjamin, Adam</u>	4	28.0%	11.4%	22.6%	18.3%	21.1%
<u>Narang, Rahul</u>	1	21.9%	7.8%	12.8%	13.0%	18.7%
<u>Brigandi, Paul</u>	3	16.2%	3.7%	22.5%	11.4%	18.6%
<u>Yao, Di</u>	1	24.0%	17.2%	13.1%	13.9%	18.5%
<u>Baron, Ronald</u>	1	13.7%	-7.2%	30.4%	22.6%	18.2%
<u>Kim, Tony</u>	1	18.2%	0.2%	6.3%	11.9%	17.9%
<u>Khan, Ali</u>	1	16.9%	8.3%	10.0%	13.2%	17.1%
<u>de Boutray, Brooke</u>	1	24.2%	-2.3%	9.2%	10.7%	16.4%
<u>Fish, Denny</u>	1	22.4%	11.0%	9.3%	12.3%	16.3%
<u>Oberweis, James W.</u>	1	2.5%	18.9%	32.0%	12.6%	15.6%
<u>Allen, Kennard W.</u>	1	24.6%	13.0%	9.7%	9.3%	15.4%
<u>Smith, Michael T.</u>	1	13.2%	-0.5%	5.6%	9.4%	15.1%
<u>Sabel, Matthew D.</u>	1	19.5%	5.2%	6.2%	9.2%	15.0%
<u>Fletcher, Daniel J.</u>	1	20.6%	1.9%	10.4%	12.0%	14.9%
<u>Rizzo, Dominic</u>	1	23.5%	9.9%	-0.9%	3.5%	14.7%
<u>Weiner, Jason</u>	1	11.1%	1.7%	14.3%	13.4%	14.7%
<u>Weaver, Kyle</u>	1	16.7%	3.7%	8.6%	14.6%	14.6%
<u>Bakrj, Ziad</u>	1	13.8%	8.3%	10.4%	14.0%	14.6%
<u>Caruso, Frank V.</u>	2	13.2%	4.1%	10.9%	12.3%	14.4%
<u>Christensen, Jon K.</u>	1	8.6%	14.4%	16.9%	11.7%	14.0%
<u>Acker, Andrew</u>	1	4.1%	21.5%	11.1%	11.4%	14.0%
<u>Shepov, Boris</u>	1	8.9%	3.9%	10.0%	9.6%	13.9%
<u>Segalani, Justin</u>	1	-4.0%	3.4%	12.4%	11.7%	13.8%
<u>McCarragher, Kathleen A.</u>	1	20.5%	3.2%	9.7%	10.5%	13.7%
<u>Beiley, Todd</u>	1	7.8%	4.1%	5.2%	7.8%	13.7%
<u>Yoon, Edward L.</u>	2	5.1%	14.5%	6.5%	9.7%	13.3%
<u>Mattingly, Elliot</u>	1	10.0%	-0.7%	17.0%	12.3%	13.1%
<u>Spencer, Joshua K.</u>	1	6.4%	-1.6%	3.7%	9.2%	12.9%
<u>Michaels, Jordan</u>	1	7.1%	12.5%	24.6%	15.5%	12.8%
<u>Baker, Becky</u>	1	4.8%	3.5%	1.0%	6.0%	12.7%
<u>Zeuthen, Robert C.</u>	1	22.4%	1.6%	4.7%	6.8%	12.5%
<u>Constantino, Jeffrey C.</u>	2	8.1%	1.9%	13.5%	12.9%	12.5%
<u>Danoff, William</u>	1	14.4%	9.9%	10.5%	9.6%	12.4%
<u>Ojalloran, F. Thomas</u>	2	5.6%	7.9%	9.0%	9.2%	12.4%
<u>Kolokotronis, Theo A.</u>	2	9.1%	7.2%	12.7%	7.0%	12.4%
Stimpson, Robert D.	1	16.3%	7.1%	5.7%	7.3%	12.4%

Manager Name	Number of Funds	2023 - YTD (avg)	2023 - 1 Yr (avg)	2023 - 3 Yr (avg)	2023 - 5 Yr (avg)	2023 - 10 Yr (avg)
<u>Netschert, Debra</u>	1	6.4%	20.5%	10.6%	9.3%	12.4%
<u>Davidowitz, Daniel</u>	1	14.2%	-0.5%	4.5%	9.3%	12.3%
<u>Malooly, John</u>	1	5.0%	-3.7%	1.5%	8.8%	12.3%
<u>Hynes, Jean M.</u>	1	5.3%	13.4%	10.3%	11.5%	12.2%
<u>Peron, Matthew</u>	1	15.2%	3.7%	9.9%	10.5%	12.1%
<u>Kok, U-Wen</u>	1	10.7%	7.9%	13.2%	8.8%	11.9%
<u>Kelly, Patrick</u>	1	15.3%	-1.4%	6.3%	8.6%	11.9%
<u>Ward, Howard F.</u>	1	17.2%	-3.2%	6.3%	9.3%	11.8%
<u>Korngiebel, Kenneth</u>	1	5.7%	-9.9%	6.7%	8.0%	11.7%
<u>Razzaque, Fahim</u>	1	0.1%	7.3%	23.8%	10.9%	11.6%
<u>Retzler, Chris J.</u>	1	-5.7%	-7.2%	7.5%	12.3%	11.5%
<u>Sykes, Rebecca</u>	1	1.2%	8.4%	5.7%	8.4%	11.4%
<u>Berghuis, Brian W.H.</u>	1	6.5%	2.0%	10.2%	8.0%	11.4%
<u>Sherwood, Daniel</u>	1	7.1%	1.1%	21.6%	9.8%	11.3%
<u>Shah, Ash B.</u>	1	12.9%	-7.8%	4.0%	7.0%	11.2%
<u>Krebs, Cory S.</u>	1	4.1%	5.1%	11.0%	5.7%	11.1%
<u>Smead, William W.</u>	1	-2.1%	2.2%	22.0%	11.1%	11.0%
<u>Peck, Andrew</u>	1	3.1%	3.4%	6.7%	8.4%	10.9%
<u>England, James</u>	1	3.4%	-1.7%	19.3%	8.2%	10.8%
<u>Taylor, J.B.</u>	1	4.3%	-3.9%	11.3%	7.8%	10.8%
<u>Suwwan de Felipe, Karim</u>	1	8.9%	17.7%	9.8%	13.2%	10.8%
<u>Pfannenstiel, Clayton</u>	1	-0.6%	16.1%	13.8%	3.6%	10.8%
<u>Aronow, Bruce K.</u>	1	8.8%	-2.6%	5.7%	6.9%	10.7%
<u>Fruhan, Matthew W.</u>	1	5.5%	4.9%	18.5%	10.5%	10.7%
<u>Park, Jean</u>	1	5.8%	3.3%	9.0%	8.8%	10.6%
<u>Bruso, Chad</u>	1	1.5%	1.5%	6.0%	7.4%	10.6%
<u>Adams, Andrew R.</u>	1	9.5%	2.5%	13.5%	10.7%	10.4%
<u>Calamos, John P.</u>	1	14.2%	-1.0%	11.1%	8.1%	10.3%
<u>Barsa, Peter M.</u>	1	0.8%	7.3%	6.7%	8.9%	10.3%
<u>Oelschlager, James D.</u>	1	1.8%	-5.7%	7.9%	6.4%	10.2%
<u>Kontopoulos, Eirene</u>	1	2.6%	28.9%	3.6%	6.8%	10.1%
<u>Fobes, Malcom R. III</u>	1	21.7%	-15.3%	-11.0%	1.1%	9.9%
<u>Neches, Michael</u>	20	9.4%	-3.0%	9.3%	4.8%	9.8%
<u>Ackerman, Charlie</u>	1	-3.4%	-1.2%	15.6%	8.8%	9.7%
<u>Vale, Judith M.</u>	1	2.6%	6.6%	11.4%	7.4%	9.4%
<u>Male, Robert</u>	1	-0.6%	6.2%	5.5%	7.7%	9.4%
<u>Kaul, Rajiv</u>	1	3.8%	31.3%	-0.5%	4.1%	9.3%
<u>Peters, Sam</u>	1	2.6%	0.5%	19.4%	8.8%	9.2%
<u>Daniel, Arun</u>	1	5.0%	-6.1%	9.3%	6.7%	9.2%

Manager Name	Number of Funds	2023 - YTD (avg)	2023 - 1 Yr (avg)	2023 - 3 Yr (avg)	2023 - 5 Yr (avg)	2023 - 10 Yr (avg)
<u>Tillinghast, Joel C.</u>	1	1.5%	1.8%	18.1%	7.9%	9.2%
<u>Lee, Keith A.</u>	1	6.5%	1.3%	-3.5%	0.3%	9.1%
<u>Drukker, Matthew</u>	1	24.1%	6.6%	7.2%	10.0%	9.1%
<u>Maris, George P.</u>	1	7.0%	4.1%	17.5%	8.0%	9.0%
<u>Bishop, Stephen J.</u>	3	5.2%	0.4%	-3.8%	-0.0%	8.9%
<u>Shroff, Sharat</u>	1	4.9%	9.0%	21.3%	3.4%	8.8%
<u>Hinton, Bradley P.</u>	1	7.6%	-0.2%	11.4%	9.5%	8.5%
<u>Arnott, Robert D.</u>	1	-1.9%	-2.4%	16.0%	6.1%	8.5%
<u>Mainelli, Joseph M.</u>	1	-0.2%	-0.1%	18.0%	7.4%	8.4%
<u>Nygren, William C.</u>	1	10.5%	-2.4%	18.9%	5.1%	8.3%
<u>Davis, Christopher Cullom</u>	2	0.3%	-3.9%	14.0%	4.2%	8.3%
<u>Grossman, Michael</u>	1	3.4%	6.8%	4.1%	5.8%	8.2%
<u>Fujimura, Tadahiro</u>	1	9.3%	13.3%	4.8%	-0.3%	8.1%
<u>Kumble, Di</u>	1	-1.9%	-1.1%	11.9%	6.8%	8.1%
<u>Byrum, Michael P.</u>	10	11.2%	0.9%	7.3%	7.4%	8.0%
<u>Schutz, Anton</u>	1	-25.9%	-26.5%	18.0%	-3.5%	7.9%
<u>Newcomb, Kent</u>	1	-1.5%	-1.3%	8.1%	8.9%	7.8%
<u>Chwang, Winnie</u>	1	-8.3%	-9.2%	-6.5%	2.4%	7.7%
<u>Jennings, Frank V.</u>	1	7.8%	-4.7%	-0.9%	-3.0%	7.7%
<u>Chu, Albert</u>	1	-6.8%	-3.8%	37.2%	10.4%	7.6%
<u>Hendon, Shawn M.</u>	1	0.3%	0.8%	15.1%	5.4%	7.6%
<u>Bonavico, Christopher J.</u>	1	1.0%	0.8%	-4.0%	1.0%	7.5%
<u>Mulholland, Mark</u>	1	5.0%	-7.5%	10.3%	4.0%	7.5%
<u>Miller, Daniel</u>	1	0.6%	-3.9%	20.1%	4.4%	7.5%
<u>Reed, Matt</u>	2	-14.6%	-16.5%	15.0%	1.9%	7.5%
<u>Jacob, Ryan I.</u>	3	5.6%	-6.5%	3.9%	5.0%	7.4%
<u>McCulloch, Evan S.</u>	1	6.2%	24.5%	-2.1%	2.2%	7.4%
<u>Hodges, Craig D.</u>	1	0.5%	5.8%	23.3%	1.2%	7.3%
<u>Perkins, Daniel S.</u>	1	11.7%	9.4%	9.1%	4.7%	7.3%
<u>Lynch, Dennis P.</u>	6	18.0%	-8.4%	-6.4%	5.2%	7.3%
<u>Dasani, Hiren</u>	1	-0.7%	2.8%	14.8%	4.2%	7.3%
<u>Jaffee, Diane E.</u>	1	-0.4%	-3.5%	20.1%	3.9%	7.2%
<u>Landis, Kevin M.</u>	1	-5.4%	-32.7%	-16.5%	-6.5%	7.1%
<u>Nagle, Ruth</u>	1	9.5%	-4.3%	13.8%	3.3%	7.0%
<u>Munchak, Anthony J.</u>	1	-2.4%	1.0%	8.7%	6.1%	7.0%
<u>Fine, Matthew</u>	1	6.7%	10.8%	37.4%	7.4%	6.8%
<u>Gokgol-Kline, Arman</u>	1	6.3%	-4.3%	7.9%	6.9%	6.8%
<u>Kelley, Ryan C.</u>	1	0.8%	-2.5%	11.8%	6.9%	6.7%
<u>Fogdall, Jed S.</u>	3	2.9%	5.5%	18.1%	3.3%	6.6%

Manager Name	Number of Funds	2023 - YTD (avg)	2023 - 1 Yr (avg)	2023 - 3 Yr (avg)	2023 - 5 Yr (avg)	2023 - 10 Yr (avg)
<u>Montgomery, John N.R.</u>	2	3.3%	-4.6%	19.9%	4.9%	6.4%
<u>Curry, Susan</u>	1	-29.2%	-30.9%	9.3%	-4.5%	6.4%
<u>Nasgovitz, William J.</u>	1	-0.6%	4.0%	18.0%	4.2%	6.1%
<u>Schramm-Fuchs, Robert</u>	1	9.7%	15.4%	16.1%	5.9%	6.0%
<u>DiZio, Andrew T.</u>	1	3.0%	-7.3%	9.4%	5.7%	5.8%
<u>Stoeffel, James P.</u>	1	-3.2%	-4.6%	16.4%	5.7%	5.5%
<u>Weitz, Wallace R.</u>	1	3.6%	-3.3%	10.2%	5.3%	5.5%
<u>Smith, Joseph P.</u>	1	3.8%	-6.5%	13.7%	6.2%	5.4%
<u>Jones, Robert T.</u>	1	-0.2%	4.6%	17.2%	4.4%	4.7%
<u>Hawkins, O. Mason</u>	1	10.9%	-8.6%	14.5%	1.9%	4.4%
<u>Abernethy, Nicole</u>	1	-0.7%	-11.2%	-0.8%	2.8%	4.3%
<u>Orrell, Gregory M.</u>	1	13.2%	0.7%	2.2%	11.1%	4.3%
<u>Endresen, Borge</u>	3	9.5%	14.6%	10.2%	1.3%	4.2%
<u>Rosenfeld, Edward</u>	1	7.9%	3.5%	7.6%	-1.4%	4.0%
<u>Huber, Joseph R.</u>	1	-0.1%	3.2%	21.1%	3.6%	4.0%
<u>Quirijns, Rogier</u>	1	2.9%	-6.9%	6.9%	2.8%	3.8%
<u>Ooi, Yao Hua</u>	1	-1.6%	-3.6%	33.4%	11.3%	3.6%
<u>Kertsos, Thomas</u>	1	17.3%	10.1%	4.4%	11.1%	3.5%
<u>Piper, William Scott</u>	1	10.4%	16.2%	23.6%	7.8%	3.5%
<u>Bishop, Alastair</u>	1	-5.0%	0.2%	25.3%	6.8%	3.4%
<u>Foster, Joseph M.</u>	1	16.1%	13.7%	1.6%	7.5%	2.8%
<u>Schwab, Howard</u>	1	1.5%	-2.2%	4.5%	0.7%	2.8%
<u>Rodosky, Stephen A.</u>	2	3.8%	-9.0%	0.6%	2.8%	2.7%
<u>Sheridan, Matthew</u>	1	3.8%	1.3%	5.4%	1.4%	2.7%
<u>Belisle, Peter</u>	2	-7.5%	-7.3%	25.7%	3.7%	2.4%
<u>Durkay, Laurel</u>	1	4.8%	-7.2%	11.7%	-0.1%	2.4%
<u>Vandersteel, Tina</u>	1	2.0%	-0.4%	1.1%	0.3%	2.4%
<u>Romano, Rick J.</u>	1	3.4%	-7.3%	5.9%	1.7%	2.3%
<u>Bradshaw, Michael P.</u>	1	18.1%	16.4%	1.5%	9.2%	2.1%
<u>Mertz, Kenneth G.</u>	1	-18.3%	-38.3%	-1.6%	-12.3%	2.1%
<u>Thomas, Scott</u>	1	4.0%	-3.5%	8.9%	3.2%	2.0%
<u>Leverenz, Justin M.</u>	1	11.1%	14.1%	2.8%	-0.9%	2.0%
<u>Bradley, Brendan O.</u>	1	7.9%	-1.1%	8.3%	-0.4%	1.7%
<u>Dhillon, Mannik</u>	1	15.9%	10.5%	0.4%	7.9%	1.6%
<u>Yu, Nelson</u>	1	4.5%	-2.0%	6.1%	-1.7%	1.6%
<u>Brown, Neil P.</u>	1	-8.6%	-1.2%	31.9%	5.1%	1.5%
<u>Calhoun, Steven</u>	1	12.0%	5.7%	-2.1%	6.4%	1.4%
<u>White, Keith</u>	1	5.2%	12.7%	24.0%	6.2%	1.4%
<u>Reynal, Michael L.</u>	1	2.5%	-3.2%	3.8%	-3.1%	1.3%

Manager Name	Number of Funds	2023 - YTD (avg)	2023 - 1 Yr (avg)	2023 - 3 Yr (avg)	2023 - 5 Yr (avg)	2023 - 10 Yr (avg)
<u>Ryan, Matthew W.</u>	1	2.4%	1.4%	-0.5%	0.5%	1.2%
<u>Barrickman, Joshua C.</u>	1	4.9%	-7.2%	-12.4%	-0.1%	1.2%
<u>White, Dara J.</u>	1	0.9%	-2.5%	-0.3%	-2.9%	1.0%
<u>Arnopolin, Yacov</u>	1	2.9%	0.7%	-0.6%	0.1%	1.0%
<u>Donald, James M.</u>	1	8.0%	4.6%	9.4%	-1.2%	0.5%
<u>Levering, G. Thomas</u>	1	-1.3%	7.3%	17.9%	-1.5%	0.3%
<u>Motamed, Ali</u>	1	12.6%	22.4%	48.4%	28.0%	0.0%
<u>James, Jeffrey</u>	1	3.9%	6.9%	18.0%	14.2%	0.0%
<u>Binion, Parker B.</u>	1	12.5%	0.3%	-3.1%	5.3%	0.0%
<u>Goehring, Leigh R.</u>	1	-1.2%	-4.1%	38.5%	4.2%	0.0%
<u>Benkendorf, Matthew</u>	1	-0.5%	-3.9%	0.1%	-3.4%	-0.5%
<u>Davis, Mackenzie B.</u>	1	2.8%	8.1%	67.9%	5.8%	-0.7%
<u>Wachnitz, Verena E.</u>	1	13.8%	15.7%	16.5%	0.6%	-0.9%
<u>Cameron, Charles T.</u>	1	-8.6%	-8.1%	22.6%	1.2%	-1.0%
<u>Schlotthauer, Nicolas</u>	1	-1.3%	-2.4%	-2.0%	-1.6%	-1.0%
<u>Hasenstab, Michael J.</u>	1	0.4%	-1.2%	-3.7%	-2.8%	-1.0%
<u>Craige, James E.</u>	1	4.1%	4.7%	-0.4%	-1.6%	-1.1%
<u>Radke, Shannon D.</u>	1	-11.8%	-2.1%	24.9%	-2.8%	-1.1%
<u>Holt, Kevin C.</u>	2	-6.4%	0.8%	36.1%	2.4%	-1.5%
<u>Ilyasov, Alexander V.</u>	1	2.4%	-17.2%	-21.2%	-4.4%	-2.1%
<u>Holmes, Frank E.</u>	4	2.6%	0.4%	5.3%	-0.5%	-2.2%
<u>Pruett, William</u>	1	5.9%	6.5%	11.8%	-2.1%	-3.4%
<u>Hanson, Scott</u>	3	2.2%	-0.9%	-21.4%	-17.7%	-7.3%
<u>Brucker, Willis</u>	1	-0.8%	4.2%	0.5%	-5.1%	-10.9%
<u>Adamson, Ulle</u>	1	30.4%	46.4%	-31.2%	-24.0%	-14.5%
<b>Totals (178 groups)</b>	<b>240</b>	<b>6.7%</b>	<b>1.5%</b>	<b>9.9%</b>	<b>5.6%</b>	<b>7.8%</b>