

<b>1 YEAR</b>	<b>1-YEAR TOTAL RETURN</b>
1 Quantified STF Investor	61.8%
2 Teberg	34.9
3 Value Line Capital Appreciation Investor	34.4
4 Disciplined Growth Investors	33.0
5 American Funds Growth Portfolio A	28.7
6 Putnam Retirement Advantage 2065 A	25.6
7 Baron WealthBuilder Retail	25.4
8 Franklin Corefolio Allocation A	25.4
9 Putnam Retirement Advantage 2060 A	25.2
10 Plumb Balanced Investor	25.1
<b>CATEGORY AVERAGE</b>	<b>14.8%</b>

<b>3 YEARS</b>	<b>3-YEAR ANNUALIZED RETURN</b>
1 First Foundation Total Return A	13.6%
2 Conquer Risk Defensive Bull	11.8
3 Prospector Capital Appreciation	9.6
4 Morgan Stanley Multi-Asset Real Return A	9.5
5 Teberg	9.4
6 Davis Appreciation & Income A	9.3
7 Hartford Real Asset A	9.3
8 Thornburg Investment Income Builder A	9.1
9 First Eagle US Value A	8.6
10 Fairholme Focused Income	8.4
<b>CATEGORY AVERAGE</b>	<b>2.8%</b>

<b>5 YEARS</b>	<b>5-YEAR ANNUALIZED RETURN</b>
1 Quantified STF Investor	18.4%
2 Baron WealthBuilder Retail	16.8
3 Teberg	14.8
4 First Foundation Total Return A	13.8
5 Fidelity Convertible Securities	13.7
6 Kinetics Global No Load	13.1
7 Dynamic US Opportunity N	13.0
8 Disciplined Growth Investors	12.9
9 Calamos Growth & Income A	12.9
10 T. Rowe Price Capital Appreciation*	12.8
<b>CATEGORY AVERAGE</b>	<b>7.8%</b>

<b>10 YEARS</b>	<b>10-YEAR ANNUALIZED RETURN</b>
1 T. Rowe Price Capital Appreciation*	10.5%
2 Allspring Diversified Cap Bldr A	10.2
3 Franklin Convertible Securities A*	9.6
4 Disciplined Growth Investors	9.5
5 American Funds Growth Portfolio A	9.2
6 Calamos Growth & Income A	9.1
7 Fidelity Balanced	9.0
8 Virtus Convertible A	8.9
9 Fidelity Puritan	8.8
10 North Square Multi Strategy A	8.8
<b>CATEGORY AVERAGE</b>	<b>5.6%</b>

# Kiplinger Mutual Fund Guide

**Sasha Hu**



## **Kiplinger Mutual Fund Guide:**

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## **Table of Contents Kiplinger Mutual Fund Guide**

1. Understanding the eBook Kiplinger Mutual Fund Guide
  - The Rise of Digital Reading Kiplinger Mutual Fund Guide
  - Advantages of eBooks Over Traditional Books
2. Identifying Kiplinger Mutual Fund Guide
  - Exploring Different Genres
  - Considering Fiction vs. Non-Fiction
  - Determining Your Reading Goals
3. Choosing the Right eBook Platform
  - Popular eBook Platforms
  - Features to Look for in an Kiplinger Mutual Fund Guide
  - User-Friendly Interface
4. Exploring eBook Recommendations from Kiplinger Mutual Fund Guide
  - Personalized Recommendations
  - Kiplinger Mutual Fund Guide User Reviews and Ratings
  - Kiplinger Mutual Fund Guide and Bestseller Lists
5. Accessing Kiplinger Mutual Fund Guide Free and Paid eBooks
  - Kiplinger Mutual Fund Guide Public Domain eBooks
  - Kiplinger Mutual Fund Guide eBook Subscription Services
  - Kiplinger Mutual Fund Guide Budget-Friendly Options

6. Navigating Kiplinger Mutual Fund Guide eBook Formats
  - ePub, PDF, MOBI, and More
  - Kiplinger Mutual Fund Guide Compatibility with Devices
  - Kiplinger Mutual Fund Guide Enhanced eBook Features
7. Enhancing Your Reading Experience
  - Adjustable Fonts and Text Sizes of Kiplinger Mutual Fund Guide
  - Highlighting and Note-Taking Kiplinger Mutual Fund Guide
  - Interactive Elements Kiplinger Mutual Fund Guide
8. Staying Engaged with Kiplinger Mutual Fund Guide
  - Joining Online Reading Communities
  - Participating in Virtual Book Clubs
  - Following Authors and Publishers Kiplinger Mutual Fund Guide
9. Balancing eBooks and Physical Books Kiplinger Mutual Fund Guide
  - Benefits of a Digital Library
  - Creating a Diverse Reading Collection Kiplinger Mutual Fund Guide
10. Overcoming Reading Challenges
  - Dealing with Digital Eye Strain
  - Minimizing Distractions
  - Managing Screen Time
11. Cultivating a Reading Routine Kiplinger Mutual Fund Guide
  - Setting Reading Goals Kiplinger Mutual Fund Guide
  - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of Kiplinger Mutual Fund Guide
  - Fact-Checking eBook Content of Kiplinger Mutual Fund Guide
  - Distinguishing Credible Sources
13. Promoting Lifelong Learning
  - Utilizing eBooks for Skill Development
  - Exploring Educational eBooks
14. Embracing eBook Trends
  - Integration of Multimedia Elements

- Interactive and Gamified eBooks

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