

March 9, 2016

PlanTools™ has expanded the 18 current monitoring standards to 67. The list below outlines all of the available standards that may be used within your Quarterly Monitoring Report and Investment Policy Statement.

## Total Return

Total Return 1Y  
Total Return 3Y  
Total Return 5Y  
Total Return 10Y

## Risk

Mstar Risk 3Y  
Mstar Risk 5Y  
Mstar Risk 10Y  
Std Deviation 1Y  
Std Deviation 3Y  
Std Deviation 5Y  
Std Deviation 10Y  
Tracking Error 3Y  
Tracking Error 5Y  
Tracking Error 10Y

## Risk - Return

Alpha 1Y  
Alpha 3Y  
Alpha 5Y  
Alpha 10Y  
Batting Average 1Y  
Batting Average 3Y  
Batting Average 5Y  
Batting Average 10Y  
Beta 1Y  
Beta 3Y  
Beta 5Y  
Beta 10Y  
Capture Ratio 1Y  
Capture Ratio 3Y  
Capture Ratio 5Y  
Capture Ratio 10Y  
Information Ratio 1Y  
Information Ratio 3Y  
Information Ratio 5Y  
Information Ratio 10Y

## Risk - Return

Star Rating 3Y  
Star Rating 5Y  
Star Rating 10Y  
Star Rating Overall  
R-squared 1Y  
R-squared 3Y  
R-squared 5Y  
R-squared 10Y  
R-Squared 1Y Peer Group Beaten  
R-Squared 3Y Peer Group Beaten  
R-Squared 5Y Peer Group Beaten  
R-Squared 10Y Peer Group Beaten  
Sharpe Ratio 1Y  
Sharpe Ratio 3Y  
Sharpe Ratio 5Y  
Sharpe Ratio 10Y  
Sortino Ratio 1Y  
Sortino Ratio 3Y  
Sortino Ratio 5Y  
Sortino Ratio 10Y  
Treydor Ratio 1Y  
Treydor Ratio 3Y  
Treydor Ratio 5Y  
Treydor Ratio 10Y

## Fund Data

Annual Turnover  
Assets in Top 10  
Asset Value in Product  
Expense Ratio  
Expense Ratio Value  
Manager Invested  
Manager Tenure  
Product History  
Trailing 12 Month Yield

