

# Investing style factors

## Investing Style Factors

### Value

Investing in stocks that are under-valued vs their financial fundamentals.

### Growth/Momentum

Investing in stocks whose prices are appreciating when indicators show they will continue higher.

### Quality

Investing in stocks that have strong balance sheets, management and earnings performance.

### Volatility

Investing in stocks that have low price volatility.

	Best return					Worst return
2010	Small-cap growth IWO	Mid-cap growth IWP	Small-cap value IWN	Mid-cap value IWS	Large-cap growth IWF	Large-cap value IWD
2011	Large-cap growth IWF	Large-cap value IWD	Mid-cap value IWS	Mid-cap growth IWP	Small-cap growth IWO	Small-cap value IWN
2012	Mid-cap value IWS	Small-cap value IWN	Large-cap value IWD	Mid-cap growth IWP	Large-cap growth IWF	Small-cap growth IWO
2013	Small-cap growth IWO	Mid-cap growth IWP	Small-cap value IWN	Large-cap growth IWF	Mid-cap value IWS	Large-cap value IWD
2014	Mid-cap value IWS	Large-cap value IWD	Large-cap growth IWF	Mid-cap growth IWP	Small-cap growth IWO	Small-cap value IWN
2015	Large-cap growth IWF	Mid-cap growth IWP	Small-cap growth IWO	Large-cap value IWD	Mid-cap value IWS	Small-cap value IWN
2016	Small-cap value IWN	Mid-cap value IWS	Large-cap value IWD	Small-cap growth IWO	Mid-cap growth IWP	Large-cap growth IWF
2017	Large-cap growth IWF	Mid-cap growth IWP	Small-cap growth IWO	Large-cap value IWD	Mid-cap value IWS	Small-cap value IWN
2018	Large-cap growth IWF	Mid-cap growth IWP	Large-cap value IWD	Small-cap growth IWO	Mid-cap value IWS	Small-cap value IWN
2019	Large-cap growth IWF	Mid-cap growth IWP	Small-cap growth IWO	Mid-cap value IWS	Large-cap value IWD	Small-cap value IWN

■ Russ 1000 Gth iShr ■ Russ 1000 Val iShr ■ Russell MC Growth iS ■ Russell MC Value iS ■ Russ 2000 Gth iShr ■ Russ 2000 Val iShr

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