

*Stock Market*

*Large-Cap Growth*

*Asset Class*

# **Stock Market Asset Classes**

**Large-Cap Growth Funds**

**Small-Cap Growth Funds**

**Mid-Cap Growth Funds**

**Balanced Growth Funds**

**World Large Stock Funds**

**Emerging Market Funds**

# Large-Cap Growth Class Summary

After several months of research of the market classes of the stock market here is a recap of our findings for the Large-Cap Growth Class. Listed below are the suggested stocks, mutual funds and exchange traded funds that you might consider when investing in the Large-Cap Growth Funds. Please understand that all of our research is based on each fund's performance over their lifetime and with a long-term investment strategy in mind.

## **Mutual Funds:**

<b>CPOAX</b>	<b>J. P. Morgan Stanley Insight Fund Class A</b>
<b>MSEGX</b>	<b>Morgan Stanley Institutional Fund Inc. Growth Class A</b>
<b>SAGAX</b>	<b>Virtus Zevenbergen Innovative Growth Fund Class A</b>
<b>IALAX</b>	<b>Transamerica Capital Growth Fund Class A</b>
<b>FDGRX</b>	<b>Fidelity Growth Company</b>

## **Exchange Traded Funds:**

<b>QQQ</b>	<b>Invesco QQQ Trust Fund</b>
<b>MGK</b>	<b>Vanguard Mega-Cap Growth ETF</b>
<b>JKE</b>	<b>iShares Morningstar Large-Cap Growth ETF</b>
<b>VUG</b>	<b>Vanguard Growth Index Fund ETF</b>
<b>IWF</b>	<b>iShares Russell 1000 Growth ETF</b>

## **Top Stock Holdings of All Funds:**

Apple, Amazon, Microsoft, Tesla, Shopify, Facebook, Master Card, Alphabet, Intuitive, Zoom Video. The Trade Desk.

## **Websites Used.**

[Finance.yahoo.com/screener/mutuaalfunds/new](https://finance.yahoo.com/screener/mutuaalfunds/new)

[Morningstar.com/funds/xnas/\(symbol\)/performance](https://Morningstar.com/funds/xnas/(symbol)/performance)

# Large-Cap Growth Asset Class Funds

## Top Mutual Funds to Consider

(As of Feb. 02, 2021)

J. P. Morgan Stanley Insight Fund Class A	(CPOAX)
Morgan Stanley Institutional Fund Inc. Growth Class A	(MSEGX)
Virtus Zevenbergen Innovative Growth Fund Class A	(SAGAX)
Transamerica Capital Growth Fund Class A	(IALAX)
Fidelity Growth Company	(FDGRX)

Fund	Incept.	Assets	Exp. Ratio	(Yearly Return's)				Since Inception
				1yr	5yr	10yr	15yr	
CPOAX	1997	8 B	1.17	113%	41%	24%	18%	14%
MSEGX	1991	17 B	0.84	111%	36%	22%	17%	14%
SAGAX	2004	1 B	1.25	118%	41%	23%	17%	16%
IALAX	1999	5 B	1.14	107%	36%	23%	16%	14%
FDGRX	1983	64 B	0.83	68%	31%	21%	16%	15%



# Large-Cap Growth Funds

## Top Exchange Traded Funds Funds to Consider

(As of Feb. 02, 2021)

Invesco QQQ Trust Fund	QQQ
Vanguard Mega-Cap Growth ETF	MGK
iShares Morningstar Large-Cap Growth ETF	JKE
Vanguard Growth Index Fund ETF	VUG
iShares Russell 1000 Growth ETF	IWF

Fund	Incept.	Assets	Exp. Ratio	(Yearly Return's)				Since Inception
				1yr	5yr	10yr	15yr	
QQQ	1999	153 B	1.17	113%	41%	24%	18%	14.00%
MGK	2007	10 B	0.07	38%	23%	17%	----	13.00%
JKE	2004	2 B	0.25	36%	23%	20%	12%	11.00%
VUG	2004	144 B	0.04	36%	23%	17%	12%	11.00%
IWF	2000	64 B	0.19	37%	23%	17%	13%	7.00%

