

Stock Market

Mid-Cap Growth

Asset Class

Stock Market Asset Classes

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Small-Cap Growth Funds

Mid-Cap Growth Funds

World Large Stock Funds

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Stock Market Asset Classes

Mid-Cap Mutual Funds

A mid-cap fund is a pooled investment vehicle (e.g. a mutual fund or ETF) that explicitly invests in the stocks of mid-cap companies, or companies with market capitalizations ranging from approximately \$2 billion to \$10 billion.

Mid-cap funds provide a diversified portfolio of mid-cap companies for investors. Mid-cap stock funds invest in firms with established businesses. Therefore, these companies have made equity capital markets a substantial part of their capital structures. Overall, mid-cap companies tend to offer more growth potential than large-cap stocks and with less volatility than the small-cap segment.

Mid-cap funds seek to capitalize on this capital appreciation potential by creating funds that are diversified among mid-cap companies. By investing in a mid-cap fund, investors can capture the growth potential of mid-cap funds without company-specific risks.

Mid-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 Mid-Cap Growth Class. Listed below are the suggested stocks, mutual funds and exchange traded funds that you might consider when investing in the Mid-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:

BPTRX	Baron Partners Fund Retail Shares
DFCIX	Delaware S Mid-Cap Growth Class A
ARTMX	Artisan Mid-Cap Fund Investor Class A
BARAX	Baron Asset Fund Retail Class
PRNHX	T. Rowe Price New Horizons Fund

Exchange Traded Funds:

JKH	iShares Morningstar Mid-Cap Growth
XMMO	Invesco S & P Mid-Cap Momentum
MDY	SPDR S & P Mid-Cap 400 ETF Trust

Websites Used.

Finance.yahoo.com/screener/mutuaalfunds/new

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

Mid-Cap Growth Asset Class Funds

Top Mutual Funds to Consider

(As of Feb. 05, 2021)

Baron Partners Fund Retail Shares	(BPTRX)
Delaware Smid-cap Growth Class A	(DFCIX)
Artisan Mid-Cap Fund Investor Class A	(ARTMX)
Baron Asset Fund Retail Class	(BARAX)
T. Rowe Price New Horizons Fund	(PRNHX)

Fund	Incept.	Assets	Exp. Ratio	(Yearly Return's)				Since Inception
				1yr	5yr	10yr	15yr	
BPTRX	2003	7 B	2.22	135%	47%	25%	17%	19.87%
DFCIX	1986	5 B	5.75	93%	32%	21%	15%	15.60%
ARTMX	1997	8 B	1.19	55%	24%	16%	13%	15.12%
BARAX	1987	5 B	1.30	31%	23%	16%	12%	12.43%
PRNHX	1960	39 B	0.78	54%	31%	21%	16%	12/58

Mutual Funds

(As of Feb 5, 2021)

Mid-Cap Growth Funds (604 Funds)

	Baron	Pelzuzze	Artisza	Baron	T. Rowe Price					
Fund	BPTRX	DFGIX	ARTMX	BARAX	PRNHX					
Rating	5★	5★	4★	4★	5★					
Assets	7B	5B	8B	5B	39B					
Year	2003	1986	1997	1987	1960					
Mgr. Tenure Since	17yr	4yr	10yr	17yr	1yr					
Exp. Ratio	2.22	Ld Frc 5.75	1.19	1.30	0.78					
Yield %	0	0	0	0	0					
Yrs. Up/Dn.	B 42 W 47	13/4	B 93 W 42	27/1	B 93 W 42	17/6	B 59 W 44	26/17	B 58 W 39	46/14
% Yrs. Dn.	23%	29%	26%	22%	23%					
Price										
YTD	11.85	7.98	4.32	3.11	4.82					
1yr.	135	93	55	31	54					
3yr.	56	40	29	23	33					
5yr.	47	32	24	23	31					
10yr.	25	21	16	16	21					
15yr.	17	15	13	12	16					
Life Return	19.87	15.60	15.12	12.43	12.58					
10 Yr. Growth 10K	\$93,932	\$67,755	\$45,514	\$42,958	\$68,770					
No. Holdings	33	49	72	66	167					
Top 10 %	88 %	39 %	30 %	38 %	24 %					
Turnover %	8 %	113 %	45 %	9 %	46 %					
Top 3 Sectors %	Comm Cyl 55%	Tech 36%	Tech 33%	Tech 32%	Tech 32%					
	R/E 12%	Hlth 26%	Hlth 26%	Hlth 25%	Hlth 26%					
	Fin 12%	Comm Cyl 15%	Indust 12%	Fin 11%	Indust 18%					
	Comm Tech 8%	Indust 9%	Comm 20%	Indust 11%	Comm 6%					
				R/E 8%						

Mid-Cap Growth Funds

Top Exchange Traded Funds Funds to Consider

(As of Feb. 05, 2021)

IShares Morningstar Mid-Cap Growth ETF	JKH
Invesco S & P Mid-Cap Momentum ETF	XMMO
SPDR S & P 400 M-Cap Growth ETF	MDYG
SPDR S & P M=Cap 400 ETF	MDY

Fund	Incept.	Assets	Exp. Ratio	(Yearly Return's)				Since Inception
				1yr	5yr	10yr	15yr	
JKH	2004	1.5 B	0.30	48%	25%	15%	12%	12.67%
XMMO	2005	854 M	0.34%	35%	28%	25%	11%	12.06%
MDYG	2005	2 B	0.15%	30%	18%	13%	11%	11.26%
MDY	1995	18 B	0.23%	30%	18%	13%	11%	11.28%

Exchange Traded Funds

(As of Feb 5, 2021)

Mid-Cap Growth Funds (604 Funds)

	iShares	Invesco	SPDR	SPDR
Fund	JKH	XMMO	MDYG	MDY
Rating	4★	4★	2★	2★
Assets	1.5B	854M	2B	18B
Year	2004	2005	2005	1995
Mgr. Tenure Since	N/A	N/A	N/A	N/A
Exp. Ratio	0.30	0.34	0.15	0.23
Yield %	0.09	0.61	0.71	1.12
Yrs. Up/Dn.	12/4	12/3	12/3	20/5
% Yrs. Dn.	16% 25%	15% 20%	15% 20%	25% 20%
Price				
YTD	5.91	8.98	7.75	7.75
1yr.	48	35	30	30
3yr.	26	26	15	15
5yr.	25	28	18	18
10yr.	15	25	13	13
15yr.	12	11	11	11
Life Return	12.67	12.06	11.26	11.28
10 Yr. Growth 10K	\$44,039	\$42,958	\$42,958	\$43,958
No. Holdings	170	78	228	228
Top 10 %	15 %	28 %	13 %	13 %
Turnover %	26 %	194 %	49 %	45 %
Top 3 Sectors %	Tech 40 % Hth 40 % Indut 12 % Cons Cycl 6 %	Tech 27 % Hth 24 % Indut 16 % Cons Cycl 6 %	Tech 23 % Indut 18 % Hth 18 % Cons Cycl 6 %	Tech 23 % Indut 19 % Hth 18 % Cons Cycl 6 %