



New Funds in 2009

Not counting multiple share class clones, there were 236 distinctly new funds created so far in 2009. They are listed here. To see if newly-created funds outperform their older competitors, see a research report entitled “Do Newly-Created Funds Have a Performance Edge?” The report can be found in the chapter Statistical Analysis in the Subscribers Research Library of JeffMcTague.com.

I hope this information proves valuable to your fund management efforts.

as of June 2009

Fund Name	Symbol	Fund Name	Symbol
Adv Inn Cir FK MultiCp Dep Val Eq A	FAKDX	Arrow DWA Tactical A	DWTFX
Adv Inn Cir Frost Core Gr Eq A	FACEX	BlackRock Emerging Mkts Debt Inv A	BAEDX
Adv Inn Cir Frost Div Val Eq A	FADVX	BlackRock Income Builder Ptf Inv A	BABDX
Adv Inn Cir Frost Hoover S/MCp Eq A	FAHMX	BlackRock Income Ptf Inv A	BAICX
Adv Inn Cir Frost Intl Eq A	FANTX	BlackRock Intl Diversific Fd A	BAIDX
Adv Inn Cir Frost Muni Bond A	FAUMX	BlackRock Strategic Income Inv A	BASIX
Adv Inn Cir Frost Total Ret Bd A	FATRX	Calamos 130/30 Equity Fund Class A	CELSX
Alger Growth Opportunities Fund A	AOFAX	Calamos Evolving World Growth Fd A	CNWXG
Allianz Glb Inv Solut Ret Inc A	AGRAX	Calvert Global Water A	CFWAX
Allianz Glb Inv Solutions 2015 A	AZGAX	Columbia International Bond A	CNBAX
Allianz Glb Inv Solutions 2020 A	AGLAX	Columbia Marsico Global Fund A	COGAX
Allianz Glb Inv Solutions 2030 A	ABLAX	Delaware Mid Cap Value A	DLMAX
Allianz Glb Inv Solutions 2040 A	AVSAX	DFA Glb Real Estate Securities Port	DFGEX
Allianz Glb Inv Solutions 2050 A	ASNAX	DFA Intl Sustainability Core 1	DFSPX
Allianz NACM Global Eq 130/30 A	AGEAX	DFA TA World ex US Core Eq Port	DFTWX
Allianz RCM All Horizons Fund Cl A	ARHAX	DFA US Sustainability Core 1	DFSIX
Allianz RCM Disciplined Equity A	ARDAX	DFA US Targeted Value Portfolio R1	DFTVX
Allianz RCM Global Water Fund A	AWTAX	Direxion Commodity Trend Stg Inv	DXCTX
Allianz RCM International Opp A	ARIAX	Direxion Dollar Bull 2.5 X Fund Inv	DXDBX
Allstate ClearTarget 2005 Retire A	ALZAX	Dreyfus Global Sustainability Fd A	DGYAX
Allstate ClearTarget 2010 Retire A	AACAX	Dreyfus Research Growth A	DWOAX
Allstate ClearTarget 2015 Retire A	AHABX	Dreyfus US Equity Fd A	DPUAX
Allstate ClearTarget 2020 Retire A	ADABX	Driehaus Global Growth Fd	DRGGX
Allstate ClearTarget 2030 Retire A	ABEAX	DWS RREEF Glb Infrastructure A	TOLLX
Allstate ClearTarget 2040 Retire A	AFABX	DWS Select Alternative Allocation A	SELAX
Allstate ClearTarget 2050 Retire A	AEGAX	Eagle Sm Cap Core Value Fd A	EGEAX
Allstate Large Cap Index Fund	ALLDX	Eaton Vance Enhanced Eq Opt Inc A	EEEAX
American Century LStrong 2020 Adv	ARBMX	Eaton Vance Risk-Man Eq Opt Inc A	EROAX
American Century LStrong 2030 Adv	ARCMX	Eventide Gilead Fund	ETGLX
American Century LStrong 2040 Adv	ARDMX	Federated Intl Strategic Val A	IVFAX
American Century LStrong 2050 Adv	ARFMX	Federated MDT Large Cap Value A	QALVX
American Funds Intl Gr & Inc A	IGAAX	Fidelity Adv 130/30 Large Cap A	FOATX



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Fund Name	Symbol
Fidelity Adv Asset Mang 70% A	FAASX
Fidelity Adv China Region Fd A	FHKAX
Fidelity Adv Emerging EMEA A	FMEAX
Fidelity Advisor Convertible Sec A	FACVX
Fidelity Advisor Global Balanced A	FGLAX
Fidelity Advisor Worldwide A	FWAFX
Goldman Sachs Abslt Ret Tracker A	GARTX
Goldman Sachs All Cap Growth A	GALLX
Goldman Sachs Intl Eq Div and Prm A	GIDAX
Goldman Sachs Local Emg Mkt Debt	GAMDx
Goldman Sachs Struct Intl T/M Eq A	GATMX
Harbor Target Ret 2010 Fd Inv	HARFX
Harbor Target Ret 2015 Fd Inv	HARIX
Harbor Target Ret 2020 Fd Inv	HARLX
Harbor Target Ret 2025 Fd Inv	HAROX
Harbor Target Ret 2030 Fd Inv	HARTX
Harbor Target Ret 2035 Fd Inv	HARWX
Harbor Target Ret 2040 Fd Inv	HABBX
Harbor Target Ret 2045 Fd Inv	HAEEEX
Harbor Target Ret 2050 Fd Inv	HAHHX
Harbor Target Ret Inc Fd Inv	HARCX
Hartford Diversified Intl A	HDVAX
Hartford Global Equity Fund A	HLEAX
Hartford Target Retirement 2015 R3	HTJRX
Hartford Target Retirement 2025 R3	HTKRX
Hartford Target Retirement 2035 R3	HTLRX
Hartford Target Retirement 2040 R3	HTMRX
Hartford Target Retirement 2045 R3	HTNRX
Hartford Target Retirement 2050 R3	HTPRX
Highland Healthcare Fund Class A	HHCAx
HighMark Fundamental Equity A	HMFAX
ING Alternative Beta Fund A	IABAX
ING Corporate Leaders 100 A	IACLX
ING Glb Target Payment A	IGPAX
ING Index Solution 2015 Port Adv	ISAAX
ING Index Solution 2025 Port Adv	ISDAX
ING Index Solution 2035 Port Adv	ISEAX
ING Index Solution 2045 Port Adv	ISJAX
ING Index Solution Income Port Adv	ISKAX
ING Wisdom Tree Glb HgYld Eq Idx A	IGHAX
IVA Fiduciary Tr IVA Intl Fd A	IVIOX
IVA Fiduciary Tr IVA Worldwide Fd A	IVWAX
Ivy Fund-Global Bond Fund A	IVSAX

Fund Name	Symbol
Ivy Micro Cap Growth Fund A	IGWAX
J Hancock Fds III Rainer Gr Fd Adv	RGRDX
J Hancock III Leveraged Co Fd A	JVCAX
Janus Adviser Intl Forty A	JFFAX
Janus Adviser Modular Ptf Cons A	JAMPX
Janus Adviser Perkins Lg Cp Value A	JAPAX
JennDry Jennison SmCap Opp A	JNOAX
John Hancock III Small Cap Opp A	JCPAX
JPMorgan Strategic Income Opp A	JSOAX
JPMorgan Total Return A	JMTAX
Kinetics The Multi Disciplinary A	KMDAX
Laudus Mondrian Glb Eq Inv	LGEQX
Laudus Mondrian Intl Eq Inv	LIEQX
Legg Mason Prt Eq Inc Builder A	LMOAX
Legg Mason Prt Tgt Ret 2015 A	LMFAX
Legg Mason Prt Tgt Ret 2020 A	LMWAX
Legg Mason Prt Tgt Ret 2025 A	LMXAX
Legg Mason Prt Tgt Ret 2030 A	LMVAX
Legg Mason Prt Tgt Ret 2035 A	LMNAX
Legg Mason Prt Tgt Ret 2040 A	LMYAX
Legg Mason Prt Tgt Ret 2045 A	LMKAX
Legg Mason Prt Tgt Ret 2050 A	LMJAX
Legg Mason Prt Tgt Ret Fd A	LMPAX
Legg Mason Prt US LgCp Eq A	LMUPX
Lord Abbett Intl Dividend Inc A	LIDAX
Lord Abbett Shrt Duration Tax-Fr A	LSDAX
MainStay ICAP Global Fund Class A	ICGLX
Marshall Large Cap Value I	MLVIX
Morgan Stanley Alternative Opp A	MAOAX
Morgan Stanley Commodities Alpha A	COAAX
Munder Multi-Cap Growth Fd CI A	MAMGX
Nationwide Value Class A	NVMAX
Natixis ASG Glb Alternatives A	GAFAX
Natixis Delafield Select Fund A	DESAX
Natixis Loomis Sayles Intl Bond A	LSIAX
Natixis Vaughan Nelson Val Opp A	VNVAX
Neuberger Berman Climate Change A	NBCAX
Neuberger Berman Emg Mkt Eq A	NEMAX
Neuberger Berman Select Eq A	NBEAX
Nomura Asia Pacific ex Japan A	NPAAX
Nomura Global Alpha Equity A	NPGAX
Nomura Global Emerging Mkt A	NPEAX
Nomura Global Equity Income A	NPWAX



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Fund Name	Symbol	Fund Name	Symbol
Nomura Greater China A	NPCAX	Putnam Global Energy Fund A	PGEAX
Nomura India Fund A	NPIAX	Quaker Small-Cp Gr Tactical Alloc A	QGASX
Nomura International 130/30 Eq A	NPLAX	RNC Genter Dividend Income Fund	GDIIX
Nomura International Equity A	NPQAX	RVST Disciplined Lg Cap Val A	RLCAX
Nomura Japan Fund A	NPJAX	RVST Recovery & Infrastructure A	RRIAX
Nuveen Symphony International Eq A	NSIAX	Rydex Srs Tr Alternative Stra All A	RYFDX
Old Mutual 2011-2020 Aggressive A	OTAIX	Rydex Srs Tr Japan 2x Strategy Fd A	RYJSX
Old Mutual 2011-2020 Conservative A	OTCPX	Schwab Fundm Intl S/M Co Index Inv	SFIVX
Old Mutual 2011-2020 Moderate A	OTMFX	Schooner Growth & Income Fund A	SCNAX
Old Mutual 2021-2030 Aggressive A	OTAKX	Schwab Fundm Emrg Mrkt Index Inv	SFEMX
Old Mutual 2021-2030 Conservative A	OTCQX	Security Small Cap Value A	SSUAX
Old Mutual 2021-2030 Moderate A	OTMHX	State Farm LifePath 2050 A	NLPAX
Old Mutual 2031-2040 Aggressive A	OTAMX	SunAmerica Alternative Stratg A	SUNAX
Old Mutual 2031-2040 Conservative A	OTCRX	Templeton Global Total Return A	TGTRX
Old Mutual 2031-2040 Moderate A	OTMKX	Threadneedle Glb Extnd Alpha A	RTAAX
Old Mutual 2041-2050 Aggressive A	OTAOX	Threadneedle Global Eq Inc A	RTNAX
Old Mutual 2041-2050 Conservative A	OTCSX	Thrivent Equity Income Plus Fd A	TEIAX
Old Mutual 2041-2050 Moderate A	OTMMX	Thrivent Partner Worldwide Alloc A	TWAAX
Oppenheimer Transition 2025 Fund A	OTDAX	Turner Quantitative Brd Mkt Eq Inv	TBMFX
Oppenheimer Transition 2040 Fund A	OTIAX	USAA Target Retirement 2020 Fund	URTNX
Oppenheimer Transition 2050 Fund A	OTKAX	USAA Target Retirement 2030 Fund	URTRX
Pax World Global Green Fund Inv	PGRNX	USAA Target Retirement 2040 Fund	URFRX
Pax World International Fund Inv	PXINX	USAA Target Retirement 2050 Fund	URFFX
Pax World Small Cap Fund Inv	PXSCX	USAA Target Retirement Income Fund	URINX
PIMCO Fdmental Advtg Tax Eff Stg A	PFEAX	Van Kampen 2010 Retirement Stratg A	VRAAX
PIMCO Fdmental Advtg Total Rt Stg A	PTFAX	Van Kampen 2015 Retirement Stratg A	VRBAX
PIMCO Glb Advantage Strategy Bd A	PGSAX	Van Kampen 2020 Retirement Stratg A	VRCAX
PIMCO Global Multi Asset A	PGMAX	Van Kampen 2025 Retirement Stratg A	VRDAX
PIMCO RealRetirement 2010 A	PTNAX	Van Kampen 2030 Retirement Stratg A	VREAX
PIMCO RealRetirement 2020 A	PTYAX	Van Kampen 2035 Retirement Stratg A	VRFAX
PIMCO RealRetirement 2030 A	PEHAX	Van Kampen 2040 Retirement Stratg A	VRGAX
PIMCO RealRetirement 2040 A	POFAX	Van Kampen 2045 Retirement Stratg A	VRHAX
PIMCO RealRetirement 2050 A	PFYAX	Van Kampen 2050 Retirement Stratg A	VRIAX
PIMCO Unconstrained Bond Fund A	PUBAX	Van Kampen Core Growth A	VCOAX
Principal Glb Divers Income A	PGBAX	Van Kampen Global Growth Class A	VGGAX
Profunds-Ultra China Inv	UGPIX	Van Kampen In Retirement Stratg A	VIRAX
Profunds-Ultra Short China Inv	UHPIX	Vanguard Total Wld Stk Index Inv	VTWSX
Putnam Absolute Return 100 A	PARTX	Victoria 1522 Fund Adv	VMDAX
Putnam Absolute Return 300 A	PTRNX	Victory International Fund Class A	VIAFX
Putnam Absolute Return 500 A	PJMDX	Victory International Select Fund A	VISFX
Putnam Absolute Return 700 A	PDMAX	Virtus Senior Floating Rate Fund A	PSFRX
Putnam Emerging Markets Eq A	PEMMX	Wells Fargo Avtg Social Sus A	WSSAX
Putnam Global Consumer Fund A	PGCOX	Zacks Market Neutral A	ZMNAX