

AAll Releases Investor's Guide to Celebrate the 40th Anniversary of the Annual Mutual Fund Guide

Information is now available on more than 24,000 mutual funds and 2,400 ETFs with portfolio composition, tax-cost ratios, and more online.

CHICAGO, UNITED STATES, March 17, 2021 /EINPresswire.com/ -- The American Association of Individual Investors (AAll) is proud to announce the 2021 annual mutual fund guide

release. The 2021 guide includes category averages, mutual fund grades, and the annual exchange-traded fund (ETF) guide. Members can now utilize the data in both guides to explore the mutual fund and ETF evaluator tools, comparison tools, and 'first cut' mutual fund and ETF articles.

The 2021 guides have a new design in the print and PDF guides. The format consists of a single page instead of the previous two-page spread, increasing the total number of funds covered in both guides. Members will find approximately 400 mutual funds and a similar number of ETFs in the print and PDF guides. The online versions feature a revised format that provides data on more than 24,500 mutual funds and 2,400 ETFs. Both guides use category averages and a grading system. Both the print and the online version use mutual fund grades ranging from A to F. The scale works just like education grades: A's are considered good grades, while D's and F's are regarded as poor performance and failing. Each grade is tied to a percentile rank based on how a specific fund compares to its category peers. The online version provides additional data and useful information about the composition of a fund's portfolio, beta for equity funds, interest rate sensitivity for [bond funds](#), and minimum initial purchase amounts. The data will be updated monthly and is available for download to Excel spreadsheets.

By combining this data with the AAll Compare Funds Tool and tracking funds with AAll's My Portfolio, members can view the mutual funds and ETFs in their portfolio with A-F grades. For AAll A+ Investor subscribers, mutual fund and [ETF screeners](#) are available, along with real-time portfolio analysis, lists of hot and cold mutual funds & ETFs, and more.



"AAll is well known for our Sentiment Survey, our Driehaus Strategy analysis, insight on the Warren Buffett stock strategy and stock screening guide. Benzinga recognizes AAll as 'one of the best and most affordable research and learning platforms for investing that you can find,' and Well Kept Wallet named AAll one of the '10 Best Investment Sites to Invest Like a Pro.' Journalists, editors, and financial consultants frequently use AAll data and analysis for investor education articles in The Motley Fool, Zacks Investment Research, Forbes, and Business Insider. We're looking forward to sharing information about mutual funds and ETFs in upcoming articles and market updates," said Charles Rotblut, CFA, AAll Journal editor.

About AAll

The American Association of Individual Investors (AAll) is an independent, nonprofit education group that provides the tools, resources, and investment education programs. The AAll website assists individuals in successfully building and managing their own [assets](#). Formed in 1978, AAll has helped more than 2 million individual investors achieve their financial goals by becoming effective managers of their assets. Members have access to model portfolios, the monthly AAll Journal with timely research and analysis, live webinars, and access to over 30 local chapters and comprehensive investment education. A trial for A+ Investor is available at the AAll online store.

Ryan Reeh

AAll

+1 480-329-1127

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