



4Q18 Style Ratings Recap

At the beginning of each quarter, we rank each style from best to worst with our [Style Rankings Report](#). These rankings are forward looking and are indicative of how each style should perform going forward.

We also highlight the top ETFs or mutual funds, along with the worst, or ones to avoid. This analysis is available to our platinum and higher members. This information allows you to make better decisions when allocating your portfolio, which funds to avoid, or which funds to buy. Some of the best include ADRE, CLTIX, SCHD, and PMVQX. Some of the worst include SGFFX, JKK, LHVAX, and RYJ.

[Get the best fundamental research](#)

Last quarter's [Style Ratings can be found here](#). Last quarter's [Style Recap is available here](#).

The following is our analysis of each style for the fourth quarter of 2018.

- [All Cap Blend](#)
- [All Cap Growth](#)
- [All Cap Value](#)
- [Large Cap Blend](#)
- [Large Cap Growth](#)
- [Large Cap Value](#)
- [Mid Cap Blend](#)
- [Mid Cap Growth](#)
- [Mid Cap Value](#)
- [Small Cap Blend](#)
- [Small Cap Growth](#)
- [Small Cap Value](#)

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Disclosure: David Trainer and Kyle Guske II receive no compensation to write about any specific stock, style, or theme.

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To fulfill the Duty of Care, research should be:

1. **Comprehensive** - All relevant publicly-available (e.g. 10-Ks and 10-Qs) information has been diligently reviewed, including footnotes and the management discussion & analysis (MD&A).
2. **Un-conflicted** - Clients deserve unbiased research.
3. **Transparent** - Advisors should be able to show how the analysis was performed and the data behind it.
4. **Relevant** - Empirical evidence must provide [tangible, quantifiable correlation](#) to stock, ETF or mutual fund performance.

Value Investing 2.0: Diligence Matters: Technology is Key to Value Investing With Scale

Accounting data is only the beginning of fundamental research. It must be translated into economic earnings to truly understand profitability and valuation. This translation requires deep analysis of footnotes and the MD&A, a process that our [robo-analyst technology](#) empowers us to perform for thousands of stocks, ETFs and mutual funds.



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