

## DALBAR Recognizes the Best Web Sites in the Mutual Fund Industry

### T. Rowe Price & OppenheimerFunds Continue Their Number One Streak; Summary Prospectuses Now Available

(Boston, MA. - March 2010) DALBAR's 2009 Fourth Quarter Mutual Fund Ranking & Trending Report places T. Rowe Price at number one for consumer websites, earning an "Excellent" designation while Wells Fargo, OppenheimerFunds, Fidelity and Vanguard round out the top five of consumer facing websites. The top spot of the financial professional rankings went to OppenheimerFunds with an "Excellent" designation for the 20<sup>th</sup> consecutive quarter. American Funds maintained their second place position, followed by Fidelity in third, while Invesco Aim and Franklin Templeton both moved ahead, claiming the fourth and fifth places respectively.

#### Fourth Quarter Rankings, 2009: Movers and Shakers

In the world of consumer facing websites, Fidelity shook things up by moving up to number four with the addition of several Roth IRA resources to support investors who are considering a conversion amidst the regulation changes slated for 2010. Fidelity also revamped their customer service section by making it easier to access forms, manage account features, and contact the company.

Franklin Templeton jumped 4 places in the financial professional rankings, pushing their way into the top 5 for sites supporting financial professionals. After a complete redesign of their advisor site, Franklin Templeton improved navigation, enhanced functionality and invigorated the look of the site to provide a positive experience for their users, while at the same time beefing up the market commentary section.

#### Fourth Quarter Rankings, 2009:

Top-ranked websites as of the end of the fourth quarter, 2009 are:

Web Ranking	Consumer	Financial Professional
# 1	T. Rowe Price*	OppenheimerFunds*
# 2	Wells Fargo*	American Funds
# 3	OppenheimerFunds*	Fidelity
# 4	Fidelity*	Invesco Aim
# 5	Vanguard*	Franklin Templeton

\*Earns DALBAR's "Excellent" designation

#### Trend: Introducing the Summary Prospectus

During the fourth quarter, several companies complied with the new Summary Prospectus rule passed in 2008, which allows mutual fund firms to replace the Statutory Prospectus with a Summary Prospectus. This new version of the traditional prospectus consists of a 3-4-page

document that covers the mandatory requirements of the Statutory Prospectus while presenting the information in language that is understandable to the average investor.

BlackRock, American Funds and OppenheimerFunds each created a section of their website to store the new Summary Prospectuses. BlackRock allows users to view, print, email, order or subscribe to the summary prospectus while American Funds and OppenheimerFunds both added a dedicated section for summary prospectuses to their Fund Documents and Prospectuses & Reports areas.

The complete WebMonitor Mutual Fund quarterly updates for the Fourth Quarter, 2009, are available from DALBAR at [WebMonitor Quarterly Rankings](#) or 617-723-6400.

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