

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

### **T. Rowe Price and OppenheimerFunds Keep Holding Strong; Financial Websites Get Face Lift**

**(Boston, MA. - May 2009)** T. Rowe Price continued to provide exceptional online service for their Mutual Fund customers while earning the number one position in DALBAR's First Quarter Mutual Fund Rankings and Trending Report. The firm also achieved 15 consecutive quarters with an "Excellent" designation. OppenheimerFunds, Vanguard, Wells Fargo, Fidelity, BlackRock and Invesco AIM also captured Dalbar's highest honor, an "Excellent" rating, in the Mutual Fund consumer rankings.

On the Financial Professional front, OppenheimerFunds maintained a first place ranking and was the only Excellent rated site in the first quarter. American Funds, Fidelity, Franklin Templeton, BlackRock, Putnam Investments, Invesco AIM, MainStay Investments, Thrivent Financial and Lincoln Financial all followed with a "Very Good" rating.

#### ***First Quarter Rankings, 2009: Movers and Shakers***

Schwab Funds progressed up the consumer rankings 7 spots to the 8th position by adding e-Delivery services for clients' account information and email alerts for fund performance updates and closing summaries. In addition, confirmations are generated after a completed transaction, and account information can be downloaded to Excel.

Van Kampen also advanced 7 places, taking over the 20th spot with the addition of client transaction history, comprehensive product information, and an online ordering system for literature and materials such as product brochures, fact cards, and investor kits. Site navigation has been enhanced to include a "Table of Contents" feature, allowing visitors to explore the site with ease.

#### ***First Quarter Rankings, 2009:***

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

<b>Web Ranking</b>	<b>Consumer</b>	<b>Financial Professional</b>
<b># 1</b>	T. Rowe Price*	OppenheimerFunds*
<b># 2</b>	OppenheimerFunds*	American Funds
<b># 3</b>	Vanguard*	Fidelity
<b># 4</b>	Wells Fargo*	Franklin Templeton
<b># 5</b>	Fidelity*	BlackRock

\*Earns DALBAR's "Excellent" designation.

#### ***Trend: Firms Receive Face Lifts***

Several companies used the first quarter to enhance the appearance of their website, improve functionality and usability, and jump on board with some of the most recent trends and developments.

- Calvert revamped their consumer homepage by showcasing a less cluttered view and a consistent color scheme throughout the site. Navigational options are now viewed through drop-down menus and a new homepage advertising banner scrolls through pictures and product information. Sharing options have also been added, allowing visitors to post articles of interest to Facebook, Delicious and Mixx This.
- RS Investments instituted a modern design and color scheme for their consumer facing website. Enhancements include an interactive main menu that when hovered over, sections expand, allowing users to view funds by category and obtain a snapshot of the product line. A site survey, site map and search box have all been included in the new design in an effort to improve navigation.
- E\*Trade reorganized content to offer reduce clutter and enhance the aesthetic appearance of the site. To aid in this effort, the center homepage banner advertisement was expanded to span across the page, the login box was reduced in size, and additional support links are provided.

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

DALBAR, Inc., the nation's leading financial-services market research firm, is committed to raising the standards of excellence in the financial-services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the mutual fund, broker/dealer, discount brokerage, life insurance, and banking industries. They include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial-professional ratings.

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