

DALBAR Recognizes the Best Websites in the Mutual Fund Industry

T. Rowe Price & OppenheimerFunds Remain in First; Mobile Access Continues to Grow

(Boston, MA. - August, 2010) T. Rowe Price took top honors in DALBAR's Second Quarter Rankings of consumer websites, earning the firm an "Excellent" website designation.

OppenheimerFunds, Vanguard, Fidelity, and Wells Fargo followed T. Rowe Price closely in the consumer rankings, with each firm receiving an "Excellent" rating for their online offerings. Other notables in the "Excellent" category include Franklin Templeton, who jumped up 2 spots, and USAA, who also advanced 2 spots by creating a fully customizable homepage for users and improving the overall look and usability of their website navigation.

On the advisor front, OppenheimerFunds continues their reign at the top while Fidelity snagged second place after advancing two spots from last quarter and capturing their first "Excellent" designation for their advisor site. Fidelity's rise in the advisor rankings can be attributed to enhancements like new "Share" options that assist professionals with emailing content to colleagues and clients. Fidelity also created a mobile-friendly mutual fund performance & pricing site for fund information on the go. Invesco rounds out the top three advisor sites and earns an "Excellent" designation for the second consecutive quarter.

More Firms Looking at Mobile Offerings

Within DALBAR's current Top 25 mutual fund investor websites, 24 percent of firms have gone mobile to some degree. E*Trade, TD Ameritrade, and Fidelity all provide clients with robust mobile applications that give users access to their accounts, allow them to place trades, and research investments. Mobile access to bank accounts has been a reality for some time however USAA's mobile banking app far exceeds expectations by letting users actually deposit checks using their smartphone's camera. Vanguard remains one of the only fund companies to support customers with a mobile app, allowing users to check balances and place trades via their mobile devices.

In early June of 2010, three firms responded to the growing number of participants looking for mobile access to their employer-sponsored plans. Fidelity, TIAA-CREF, and Vanguard all enhanced their mobile applications and became the first firms to provide such access to participants.

On the other hand, mutual fund firms are lagging behind the life & annuity industry in the race to provide advisors with mobile resources, where firms such as AXA Equitable, John Hancock Insurance, and Principal Financial are focused on their producers, giving them access to client accounts, illustration tools, or compensation information from mobile devices. In the MF world, Fidelity is leading the pack with new mobile pricing & performance pages, which are only part of their mobile strategy, which included optimizing their advisor site for both Android and iPhone platforms.

First Quarter Rankings, 2010:

Top-ranked websites as of the end of the Second Quarter, 2010 are:

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

*Earns DALBAR's "Excellent" designation

The complete WebMonitor Mutual Fund quarterly updates for the Second Quarter, 2010, 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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