

Knowing When to Sell a Mutual Fund

This week's AAI **Weekly Digest** highlights these "must-read" AAI articles:



The Top Mutual Funds Over Five Years: Health Care's Dominance Is Weakening

While health care mutual funds had a rough 2016 compared to other category averages, health care still remains the top-performing category over the last five years. Health care funds retained four of the 10 top positions in AAI's updated Top Funds Over Five Years list, but lost some ground compared to last year's list, when seven of the top 10 were health care funds.

A More Aggressive Approach for the Model Fund Portfolio

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AAI's founder, Jim Cloonan, has been repositioning the AAI Model Fund Portfolio to make it more aggressive to attempt to take advantage of intermediate-term market trends. Since its inception, the Model Fund Portfolio has done only slightly better than the market. If a portfolio is to be active, it should pursue a policy that will lead to results that are noticeably better than the market. Toward

that end, one mutual fund and one exchange-traded fund (ETF) have been sold from the Model Fund Portfolio and two sector ETFs have been purchased.



How to Track Mutual Funds in Google Sheets

Google Sheets is an online cloud-based service that allows users to create, edit and collaborate on spreadsheets online and offline. This article illustrates how investors can use the Google Finance capabilities within Google Sheets to access mutual fund data. Google Finance is a function within Google Sheets that retrieves current or historical security information. Mutual fund prices are provided by Morningstar and mutual fund data is delayed to end of day.

The Sell Decision With Mutual Funds: Knowing When to Walk Away



Many people hop in and out of investments all too frequently. That's due in part to the fact that mutual fund advice and information are so freely available that individuals are often persuaded to switch from their more prosaic funds to those that have been delivering more exciting short-term returns. At the opposite extreme, others take the attitude that once bought, mutual funds can practically be held for a lifetime. That can be true in some instances, but it's often not—you must rethink your portfolio periodically. What are the legitimate reasons for selling funds, and when should you stay put?

Our [Member Question](#) for this week is:

Health care sector funds, on average, have been the top-performing funds over the last several years. Which sector do you think will perform best over the next five years?

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Vote to answer this week's Special Question: *What criteria do you use to decide when it is time to sell a mutual fund?*

Last Week's Results:

How do you go about rebalancing your investment portfolio?

I do not actively rebalance my investment portfolio : 51%

I sell overweight positions/asset classes and reallocate the money to underweight positions/asset classes : 28%

I allocate new investment dollars to underweight positions/asset classes : 21%

Poll results are as of 9 a.m. (Central) on Monday. 1,366 respondents.



[AAII Mutual Fund Classroom: Mutual Fund Investing Articles](#)

If you're contemplating investing in mutual funds, you'll want to arm yourself with some basic information. This AII Investor Classroom, one of the many benefits of an AII membership, gives you all the tools you need to get started. The topics covered include how to break a tie between two funds, what to look for when reading a mutual fund statement, how to research mutual funds and much more.

The AAI Weekly Digest is one of the many **benefits** of AAI membership. To learn more, consider a **risk-free Trial AAI Membership** to start becoming an effective manager of your own assets.