

0.70%
APY



Catalyst Buffered Shield Fund I SHIIX ★★★★★

Rating as of Jun 30, 2021

- Quote
- Fund Analysis
- Performance
- Risk
- Price
- Portfolio
- People
- Parent

Performance

Returns

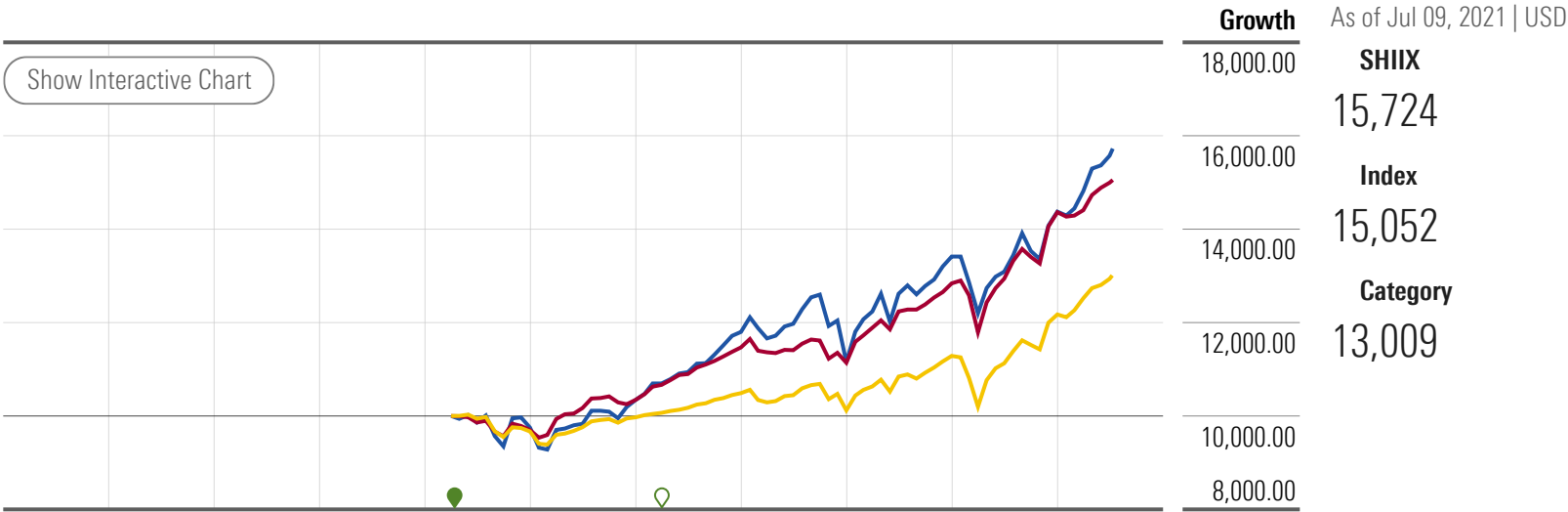
Distributions

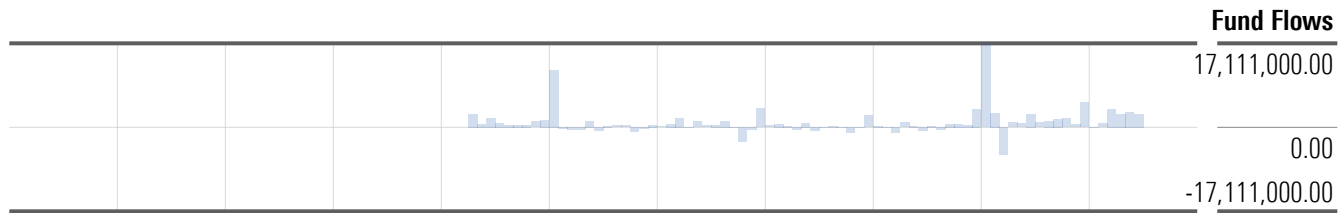
Growth of 10,000

- Fund
- Category
- Index
- Fund Flows

Manager Change

- Full
- Partial





Total Return %	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	YTD
Fund	—	—	—	—	—	6.07	14.09	-5.46	20.23	7.17	9.39
+/- Category	—	—	—	—	—	2.75	8.07	-2.01	8.90	0.01	2.25
+/- Index	—	—	—	—	—	-0.59	3.23	-2.59	4.98	-4.69	4.58
Quartile Rank	—	—	—	—	—						
Percentile Rank	—	—	—	—	—	34	6	60	8	56	27
# of Funds in Cat.	11	11	18	30	47	61	75	83	109	140	171

YTD Fund as of Jul 09, 2021 | Category: Options Trading as of Jul 09, 2021 | Index: Morningstar Mod Con Tgt Risk TR USD as of Jul 09, 2021 | Italics indicate Extended Performance.
 Extended performance is an estimate based on the performance of the fund's oldest share class, adjusted for fees.

Trailing Returns

Day End

Month End

Quarter End

	1-Month	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	15-Year	Si
Total Return %	1.34	5.11	8.33	18.97	9.15	9.63	—	—	
+/- Category	0.32	1.53	1.69	2.30	2.20	3.62	—	—	
+/- Index	0.61	1.03	3.92	3.08	-0.39	1.56	—	—	
Quartile Rank							—	—	
Percentile Rank	36	27	30	31	23	6	—	—	
Investor Return %	—	—	—	18.78	9.93	9.83	—	—	
Percentile Rank (Inv Rtn)	—	—	—	44	22	15	—	—	



Fund return as of Jun 30, 2021 | Category: Options Trading as of Jun 30, 2021 | Index: Morningstar Mod Con Tgt Risk TR USD as of Jun 30, 2021 | Inception date Apr 14, 2015 | Time periods greater than 1 year are annualized

Star Rating ★★★★★
★★★★★
3-Year

★★★★★
5-Year

—
10-Year

Category Medalist

Name	Analyst Rating
JPMorgan Hedged Equity R6	

Analyst Rating Morningstar Analyst Rating

There is no Analyst Rating data available

Asset Class

U.S. Equity

Asset Allocation

International Equity

Sector Equity

Alternative

Commodities

Taxable Bond

Municipal Bond

Equity

Large Value Funds

Large Blend Funds

Large Growth Funds

Mid-Cap Value Funds

Mid-Cap Blend Funds

Mid-Cap Growth Funds

Small Value Funds

Small Blend Funds

Small Growth Funds

Real Estate Funds

World Large Stock Funds

Foreign Large Blend Funds

Foreign Small/Mid Blend Funds

Diversified Emerging Markets Funds

Fixed-Income

Intermediate-Term Core Bond Funds

Intermediate-Term Core-Plus Bond Funds

Corporate Bond Funds

High Yield Bond Funds

Muni National Short-Term Bond Funds

Muni National Intermediate-Term Bond Funds

Muni National Long-Term Bond Funds

Ultrashort Bond Funds

Fund Type

Index Funds

Target Date Funds

Target Risk Funds

ESG Funds

Sponsor Center

 Invesco QQQ



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Transparency is how we protect the integrity of our work and keep empowering investors to achieve their goals and dreams. And we have unwavering standards for how we keep that integrity intact, from our research and data to our policies on content and your personal data.

We'd like to share more about how we work and what drives our day-to-day business.

► **How we make money**

► **How we use your personal data**

► **How we approach editorial content**



United States

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