

First Investors Funds

Morningstar
Ratings™

Morningstar Favorably Rated First Investors Funds¹

As of 12/31/17

Fund Name	Ticker	Class	Morningstar Category	Overall Morningstar Rating	3-year Morningstar Rating	5-year Morningstar Rating	10-year Morningstar Rating	Number of Funds 3-year	Number of Funds 5-year	Number of Funds 10-year
Equity Funds										
First Investors Equity Income Fund	FIUTX	A	Large Value	★★★★	★★★★	★★	★★★★	1,090	965	695
First Investors Equity Income Fund	FIUUX	Advisor	Large Value	★★★★	★★★★	★★★★	★★★★	1,090	965	695
First Investors Global Fund	FIISX	A	World Large Stock	★★★★	★★★★	★★★★	★★★★	720	589	333
First Investors Global Fund	FIITX	Advisor	World Large Stock	★★★★	★★★★	★★★★	★★★★	720	589	333
First Investors Growth & Income Fund	FGINX	A	Large-Cap Blend	★★★★	★★	★★	★★★★	1,217	1,079	800
First Investors International Fund	FIINX	A	Foreign Large Growth	★★★★	★★★★	★★	★★★★	330	289	206
First Investors International Fund	FIIPX	Advisor	Foreign Large Growth	★★★★	★★★★	★★	★★★★	330	289	206
First Investors Opportunity Fund	FIUSX	A	Mid-Cap Blend	★★★★	★★★★	★★★★	★★★★	359	324	220
First Investors Opportunity Fund	FIVUX	Advisor	Mid-Cap Blend	★★★★	★★★★	★★★★	★★★★	359	324	220
First Investors Select Growth Fund	FICGX	A	Large Growth	★★★★	★★★★	★★★★	★★	1,216	1,109	787
First Investors Select Growth Fund	FICHX	Advisor	Large Growth	★★★★★	★★★★★	★★★★★	★★	1,216	1,109	787
First Investors Special Situations Fund	FISSX	A	Small Blend	★★★★★	★★★★★	★★★★	★★★★★	652	558	400
First Investors Special Situations Fund	FISTX	Advisor	Small Blend	★★★★★	★★★★★	★★★★	★★★★★	652	558	400
Mixed Asset Funds										
First Investors Total Return Fund	FITRX	A	Allocation-50% to 70% Equity	★★★★	★★	★★★★	★★★★★	718	670	477
Taxable Bond Funds										
First Investors Fund For Income	FIFIX	A	High Yield Bond	★★★★	★★★★	★★★★	★★	609	501	319
First Investors Fund For Income	FIFKX	Advisor	High Yield Bond	★★★★	★★★★	★★★★	★★	609	501	319
First Investors International Opportunities Bond Fund	FIODX	Advisor	World Bond	★★★★	★★★★	★★★★		271	243	136
Tax Exempt Bond Funds										
First Investors Tax Exempt Income Fund	FITAX	A	Muni National Interm	★★★★★	★★★★★	★★★★★	★★★★★	258	226	155
First Investors Tax Exempt Income Fund	FITDX	Advisor	Muni National Interm	★★★★★	★★★★★	★★★★★	★★★★★	258	226	155
First Investors Tax Exempt Opportunity Fund	EIITX	A	Muni National Long	★★★★	★★	★★	★★★★	140	127	103
First Investors Tax Exempt Opportunity Fund	EIIAX	Advisor	Muni National Long	★★★★	★★★★	★★★★	★★★★	140	127	103
First Investors Tax Exempt California Fund	FICJX	Advisor	Muni California Long	★★★★	★★★★	★★★★	★★★★	85	73	63
First Investors Tax Exempt Connecticut Fund	FICTX	A	Muni Single State Long	★★★★	★★★★	★★★★	★★★★	221	191	166

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Morningstar Favorably Rated First Investors Funds¹ (continued)

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Tax Exempt Bond Funds (continued)										
First Investors Tax Exempt Connecticut Fund	FICYX	Advisor	Muni Single State Long	★★★	★★★	★★★	★★★	221	191	166
First Investors Massachusetts Tax Exempt Fund	FIMAX	A	Muni Massachusetts	★★★	★★★	★★★	★★★	47	43	39
First Investors Massachusetts Tax Exempt Fund	FIMHX	Advisor	Muni Massachusetts	★★★	★★★	★★★	★★★	47	43	39
First Investors Michigan Tax Exempt Fund	FTMIX	A	Muni Single State Long	★★★	★★★	★★★	★★★	221	191	166
First Investors Michigan Tax Exempt Fund	FTMLX	Advisor	Muni Single State Long	★★★★	★★★★	★★★★	★★★★	221	191	166
First Investors Minnesota Tax Exempt Fund	FIMNX	A	Muni Minnesota	★★★	★★★	★★★	★★★	52	43	35
First Investors Minnesota Tax Exempt Fund	FIMQX	Advisor	Muni Minnesota	★★★	★★★	★★★	★★★★	52	43	35
First Investors North Carolina Tax Exempt Fund	FMTNX	A	Muni Single State Long	★★★★	★★★	★★★	★★★★	221	191	166
First Investors North Carolina Tax Exempt Fund	FMTTX	Advisor	Muni Single State Long	★★★★	★★★★	★★★	★★★★	221	191	166
First Investors New Jersey Tax Exempt Fund	FINJX	A	Muni New Jersey	★★★	★★★	★★★	★★★	48	44	38
First Investors New Jersey Tax Exempt Fund	FINLX	Advisor	Muni New Jersey	★★★	★★★	★★★	★★★★	48	44	38
First Investors New York Tax Exempt Fund	FNYFX	A	Muni New York Long	★★★	★★★	★★★	★★★	64	59	44
First Investors New York Tax Exempt Fund	FNYHX	Advisor	Muni New York Long	★★★	★★★	★★★	★★★	64	59	44
First Investors Ohio Tax Exempt Fund	FIOHX	A	Muni Ohio	★★★★	★★★	★★★	★★★★	37	34	29
First Investors Ohio Tax Exempt Fund	FIOKX	Advisor	Muni Ohio	★★★	★★★	★★★	★★★	37	34	29
First Investors Oregon Tax Exempt Fund	FTORX	A	Muni Single State Long	★★★★	★★★	★★★	★★★★	221	191	166
First Investors Oregon Tax Exempt Fund	FTOTX	Advisor	Muni Single State Long	★★★★	★★★★	★★★	★★★★	221	191	166
First Investors Pennsylvania Tax Exempt Fund	FTPAX	A	Muni Pennsylvania	★★★★	★★★	★★★	★★★★	59	55	49
First Investors Pennsylvania Tax Exempt Fund	FTPEX	Advisor	Muni Pennsylvania	★★★★	★★★★	★★★★	★★★★	59	55	49
First Investors Virginia Tax Exempt Fund	FIVAX	A	Muni Single State Long	★★★	★★★	★★★	★★★	221	191	166
First Investors Virginia Tax Exempt Fund	FIVCX	Advisor	Muni Single State Long	★★★	★★★	★★★	★★★	221	191	166

All investment involves risk, including possible loss of principal. You can lose money by investing in any fund.

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¹ Favorably rated Morningstar funds includes First Investors Funds that have at least 3 stars or above rated among 3-year, 5-year and 10-year periods.

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