

Morningstar Favorably Rated First Investors Funds¹

As of 1/31/2019

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	FIUUX	Advisor	US Fund Large Value	★★★	★★	★★★	☆☆	1104	944	687
First Investors Global Fund	FIISX	A	US Fund World Large Stock	★★★	★★	★★★	★★★	732	627	364
First Investors Global Fund	FIITX	Advisor	US Fund World Large Stock	★★★	★★	★★★	☆☆☆	732	627	364
First Investors Growth & Income Fund	FGINX	A	US Fund Large Value	★★★	★★	★★	★★★	1104	944	687
First Investors International Fund	FIINX	A	US Fund Foreign Large Growth	★★★	★★	★★★★	★★★	364	315	228
First Investors International Fund	FIIPX	Advisor	US Fund Foreign Large Growth	★★★★	★★★★	★★★★	☆☆☆	364	315	228
First Investors Opportunity Fund	FIUSX	A	US Fund Mid-Cap Blend	★★★	★★	★★	★★★	382	340	236
First Investors Opportunity Fund	FIVUX	Advisor	US Fund Mid-Cap Blend	★★★	★★	★★★	☆☆☆	382	340	236
First Investors Select Growth Fund	FICGX	A	US Fund Large Growth	★★★	★★★★	★★★	★★	1252	1110	802
First Investors Select Growth Fund	FICHX	Advisor	US Fund Large Growth	★★★	★★★★	★★★	☆☆	1252	1110	802
First Investors Special Situations Fund	FISSX	A	US Fund Small Value	★★★	★★★★	★★★★	★★★	384	334	231
First Investors Special Situations Fund	FISTX	Advisor	US Fund Small Value	★★★★	★★★★	★★★★	☆☆☆	384	334	231
Mixed Asset Funds										
First Investors Total Return Fund	FITRX	A	US Fund Allocation--50% to 70% Equity	★★★	★★	★★	★★★	691	603	439
Taxable Bond Funds										
First Investors Fund For Income	FIFKX	Advisor	US Fund High Yield Bond	★★★	★★	★★★	☆☆	607	513	330
Tax Exempt Bond Funds										
First Investors Tax Exempt Income Fund	FITAX	A	US Fund Muni National Interm	★★★★	★★★★	★★★★	★★★★	259	225	147
First Investors Tax Exempt Income Fund	FITDX	Advisor	US Fund Muni National Interm	★★★★	★★★★	★★★★	☆☆☆☆	259	225	147
First Investors Tax Exempt Opportunity Fund	EIIAX	Advisor	US Fund Muni National Long	★★★	★★	★★★	☆☆☆	151	135	111
First Investors California Tax Exempt Fund	FICJX	Advisor	US Fund Muni California Long	★★★	★★★	★★★	☆☆	90	87	71
First Investors New Jersey Tax Exempt Fund	FINLX	Advisor	US Fund Muni New Jersey	★★★	★★★	★★★	☆☆	48	46	41
First Investors New York Tax Exempt Fund	FNYHX	Advisor	US Fund Muni New York Long	★★★	★★★	★★★	☆☆	66	65	48
First Investors Oregon Tax Exempt Fund	FTORX	A	US Fund Muni Single State Long	★★★	★★★	★★★	★★★	178	162	142
First Investors Oregon Tax Exempt Fund	FTOTX	Advisor	US Fund Muni Single State Long	★★★	★★★	★★★	☆☆☆	178	162	142



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

¹ Favorably rated Morningstar funds includes First Investors Funds that have at least 3 stars or above rating among the Overall.

The Morningstar Rating™ for funds, or “star rating”, is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product’s monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The Morningstar Rating does not include any adjustment for sales loads. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods. ©2019 Morningstar, Inc. All Rights Reserved. The information contained herein: (1) is proprietary to Morningstar; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information. Past performance is no guarantee of future results. Current performance may be lower or higher than the performance shown.

Ratings displayed with hollow stars represent Morningstar Extended Performance Ratings. Morningstar provides adjusted historical returns and an Extended Performance Rating for some mutual fund share class that don’t have a one-, three-, five-, or 10-year performance history. These hypothetical Morningstar Ratings are based on the historical performance of the oldest share class of the fund, adjusted for fees and expenses.

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