

# MONEY

management executive

March 27, 2017

## TOP 10 FUND MANAGERS TO WATCH

By Andrew Shilling and Suleman Din

**Among a grouping of big industry names, Pin Oak Equity Fund stands out in Morningstar's U.S. Fund Large Blend Category. The fund has been managed by Mark Oelschlager of Oak Associates for nearly 12 years.**

Managers were largely chosen by screening Morningstar data from a select group: funds with a single manager, ranked as having the best three-year annualized returns in their respective categories.

Pin Oak has reported double-digit annualized returns over the last three, five and 10 years according to Morningstar data.

Please [click here](#) for current standardized performance.

**Mark Oelschlager is one of 10 managers selected by Money Management Executive for its annual list of managers to watch.**



**Mark W. Oelschlager, CFA**

**Age:** 47

**Fund:** Pin Oak Equity (POGSX)

**Fund AUM:** \$219.9 million

**Total Returns** as of 12/31/16:

	POGSX	S&P 500
1-year:	19.25%	11.96%
3-year:	10.78%	8.87%
5-year:	17.00%	14.66%

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*Mutual fund investing involves risk, including possible loss of principal. Small cap investments typically exhibit higher volatility. Emerging markets involve heightened risks related to the same factors, in addition to those associated with their relatively small size and lesser liquidity.*

*The performance data quoted represents past performance. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost and current performance may be lower or higher than the performance quoted. For performance data current to the most recent month end, please [click here](#) or call 1-888-462-5386.*

**To determine if this Fund is an appropriate investment for you, carefully consider the Fund's investment objectives, risk factors and charges and expenses before investing. This and other information can be found in the Fund's prospectus which may be obtained by [clicking here](#) or by calling 1-888-462-5386.**

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Pin Oak Equity Fund (POGSX) seeks long-term capital growth by concentrating investments in stocks the manager believes are underappreciated by the market, irrespective of market capitalization. **Expense Ratio: 1.08%** Strategy: The Fund invests primarily in common stocks of U.S. companies that the Adviser believes possess prospects for growth that are underappreciated by the market. The Adviser invests with a long-term focus and seeks to keep the Fund's portfolio turnover to a minimum relative to its peers. Risks: The Fund's share price will fluctuate. You could lose money on your investment in the Fund and the Fund could also return less than other investments. The Fund is subject to principal risks including equity securities risk, foreign securities risk, investment focus risk, large cap risk, management risk, market risk, mid cap risk, and small cap risk.

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