



Investment Strategies, Inc.'s —
educational outreach



Investment Strategies, Inc. (ISI) has over 27 years of experience successfully navigating both bull and bear markets with an objective and disciplined approach to managing risk.

▶ **Top Performing All-Season funds — from ISI's independent analysis of 2007 Forbes Mutual Fund Survey . . .**

mutual fund candidates for both bull & bear markets . . .

- **Bruce Fund (brufx)** seeks long-term growth by investing primarily in U.S. common stocks and various types bonds. This fund has earned the best grades possible in the 2007 Forbes Mutual fund Survey. Its A+ rating for bull market performance is matched by an A+ for bear market results. Forbes gives it a Best Buy rating as well as be named to the Forbes Honor Roll (*). It has also earned a numbers of awards from Lipper. It has a low minimum initial investment, \$1000, which makes it ideal for those starting an investment portfolio. Its below-average expense ratio and clean operation make it attractive for investors of all sizes. The Bruce Fund is listed under the category of stock funds in the 2007 Forbes survey.
- **Mairs & Power Growth Fund (mpgfx)** has an objective of long-term capital growth. Its selection method focuses on companies with “reasonably predictable earnings, above average return on equity, market dominance and financial strength”, according to Forbes. It’s earned a listing on the Forbes Honor Roll (*) as well as a numbers of awards from Lipper. It has a low minimum initial investment for IRAs, \$1000, which makes it ideal for those starting or diversifying an IRA. Its expense ratio, 0.69, is well below the mean for its category. It’s listed under the growth category in the 2007 Forbes survey.
- **Vanguard Global Equity Fund (vhgex)** seeks long-term capital appreciation via U.S. and foreign stocks selected primarily from a bottom-up stock analysis approach. It has earned a B grade for both up and down market performance in the most recent Forbes rating (updated to 3/31/2007) and is listed as a Forbes Best Buy. It has also earned a numbers of awards from Lipper. Initial minimum is \$3,000. Its expense ratio is extremely low for the category owing to the acclaimed Vanguard approach make it a candidate for any portfolio. It’s listed under the category of global funds in the 2007 Forbes survey.

For more information, see the full 2007 Forbes Mutual Fund Survey, link available at www.isi-su.com

Type	Fund Name	Symbol	Up Mkt	Down Mkt	Front	12b-1	Red Chg	Exp.Ratio	Comments
Stock, flexible	Bruce Fund*	brufx	A+	A+	none	none	none	0.94	\$1,000 initial minimum (*Forbes Honor Roll)
Growth	Mairs & Power Growth Fund*	mpgfx	C	A	none	none	none	0.69	\$2,500 initial, \$1,000 IRA (*Forbes Honor Roll)
Global	Vanguard Global Equity Fund	vhgex	B	B	none	none	none	0.80	\$3,000 initial minimum

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Investment Strategies, Inc. does not recommend any type mutual fund on this list. Investors are encouraged to do their own analysis and selection. Any investment in the stock or bond markets, via individual stocks, bonds or mutual funds, involves risk. Those interested in mutual funds will find the individual fund prospectus very helpful. Data sources used to create this report are believed to be accurate, but can not be guaranteed.

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