

Morningstar Announces Winners of the Hong Kong Fund Awards 2014

Written by Australian Business

HONG KONG, CHINA-- [Media OutReach](#) -- 6 March 2014-- [Morningstar Asia Limited](#) , a subsidiary of independent investment research provider [Morningstar, Inc.](#) (NASDAQ: MORN), today announced the winning funds and fund houses of the Morningstar Hong Kong Fund Awards 2014.

The Morningstar Hong Kong Fund Awards recognize retail funds and fund houses that added the most value for investors within the context of their relevant peer group in 2013 and over the longer term. Winners are selected using a quantitative methodology with a qualitative overlay developed by Morningstar that considers the one-, three-, and five-year performance history of all eligible funds. Morningstar adjusts the returns for risk using Morningstar Risk, a measure that imposes a higher penalty for downside variation in a fund's return than it does for upside volatility.

The two fund house awards, Morningstar Best Equity Fund House and Morningstar Best Fixed-Interest Fund House, acknowledge the fund houses with the strongest risk-adjusted performance across their fund line-ups.

"We are pleased to have a mix of high-quality asset managers winning awards across our equity and fixed-income categories. Our fund house winners this year, First State and PIMCO, are established investment managers that are well regarded by investors globally. Both fund providers have delivered outstanding risk-adjusted returns across a range of funds that are of

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high relevance to investors in Hong Kong," Wing Chan, Morningstar Asia's director of fund research, said.

The winners of the Morningstar Hong Kong Fund Category Awards 2014 are:

EQUITY FUND CATEGORY

FUND SHARE CLASS WINNER

Asia ex-Japan Equity

Value Partners High-Dividend Stocks

Asia-Pacific Equity

Fidelity Funds -- Pacific Fund A-USD

Global Emerging Markets Equity

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Fidelity Funds -- Emerging Markets Fund A-ACC-USD

Global Equity

MFS Meridian Global Equity A1 GBP

Greater China Equity

First State China Growth Fund (Class I)

Hong Kong Equity

Schroder ISF Hong Kong Equity A

Japan Large-Cap Equity

JPMorgan Japan (Yen) Acc

FIXED-INTEREST FUND CATEGORY

FUND SHARE CLASS WINNER

Asia Bond

JPMorgan Asian Total Return Bond (USD)

Global Bond

Invesco Global Bond Fund A (USD)-SD Shares

Global Emerging Markets Bond

Templeton Emerging Markets Bond A QDis EUR

High Yield Bond

BlackRock Global High Yield Bond Fund (A2 USD share class)

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The winners of the Morningstar Hong Kong Fund House Awards 2014 are:

FUND HOUSE CATEGORY

FUND HOUSE WINNER

Best Equity Fund House

First State Investments

Best Fixed-Interest Fund House

PIMCO

The winner of the Best Mandatory Provident Fund (MPF) Scheme Provider Award is:

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Best MPF Scheme Provider

Fidelity Retirement Master Trust

The Morningstar Hong Kong Fund Awards are based on Morningstar fund data for the period of 1 January 2013 to 31 December 2013. For more information about the awards and the methodology, please

visit

<http://awards.morningstar.com>

References to and commentary on the above mentioned mutual funds should not be considered a solicitation to buy or sell that fund.

Company logo

<http://release.media-outreach.com/release.php/Images/1625>

About Morningstar Asia Limited and Morningstar, Inc. Morningstar Asia Limited is a subsidiary of Morningstar, Inc., a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individual investors, financial advisors, asset managers, and retirement plan providers and sponsors. Morningstar provides data on approximately 446,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on more than 10 million equities, indexes, futures, options, commodities, and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services through its registered investment advisor subsidiaries and had approximately \$159 billion in assets under advisement and management as of Dec. 31, 2013. The company has operations in 27 countries.

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Morningstar expanded to Asia in April 2000 and has grown its businesses into Japan, Korea, India, mainland China, Taiwan, Singapore, Malaysia, Thailand and Hong Kong. The Asia operations not only offer timely information on mutual funds, but also insightful and independent analyses, unbiased fund ratings, and sophisticated analytical tools to help both individual and professional investors make better investment decisions.