



## Invesco Wins 16 LSEG Lipper Awards for Outstanding Risk-Adjusted Returns across its Active Investments Platform

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**ATLANTA – March 19, 2025** – Invesco is proud to be recognized by the LSEG Lipper Fund Awards for mutual funds across its leading active fixed income and equities investments platform. Based on Lipper's quantitative, proprietary methodology, the awards recognize the outstanding performance for consistently strong risk-adjusted three-, five-, and 10-year returns relative to industry peers in each category.

"Our team is committed to delivering the excellence our clients expect through innovative investment strategies and superior engagement," said Tony Wong, Senior Managing Director and Co-Head of Investments, Invesco. "Congratulations to our investment teams. We are pleased that our active mutual fund complex is once again recognized by Lipper for its exceptional fixed income and equities offerings."

"We're proud to be recognized for expertise in building highly active, differentiated portfolios across markets and investment styles," continued Stephanie Butcher, Senior Managing Director and Co-Head of Investments, Invesco. "This accomplishment is a true testament to our dedicated investment teams. We're delighted to be acknowledged by Lipper once again for achieving excellence and providing solutions that help our clients pursue their long-term financial goals."

Invesco funds honored by the 2025 LSEG Lipper Fund Awards include:

- **Invesco California Municipal Fund** for the 10-year period ([Y share class / OCAYX](#)) in the California Municipal Debt Funds category.
- **Invesco SteelPath MLP Alpha Plus Fund** for the three- and five-year periods ([R6 share class / OSPPX](#)) in the Energy MLP Funds category.
- **Invesco AMT-Free Municipal Income Fund** for the 10-year period ([Y share class / OMFYX](#)) in the General & Insured Municipal Debt Funds category.
- **Invesco Rochester Municipal Opportunities Fund** for the 10-year period ([Y share class / ORNYX](#)) in the High Yield Municipal Debt Funds category.
- **Invesco Value Opportunities Fund** for the three- and five-year periods ([R6 share class / VVOSX](#)), and 10-year period ([R5 share class, VVONX](#)) in the Mid-Cap Value Funds category.
- **Invesco New Jersey Municipal Fund** for the five-year period ([R6 share class / IORJX](#)) in the New Jersey Municipal Debt Funds category.
- **Invesco Rochester New York Municipals Fund** for the five-year period ([R6 share class / IORUX](#)) and ten-year year period ([Y share class / RMUYX](#)) in the New York Municipal Debt Funds category.
- **Invesco Pennsylvania Municipal Fund** for the 10-year period ([Y share class / OPAYX](#)) in the Pennsylvania Municipal Debt Funds category.
- **Invesco Short Term Municipal Fund** for the 10-year period ([Y share class / ORSYX](#)) in the Short Municipal Debt Funds category.
- **Invesco Small Cap Value Fund** for the three- and five-year periods ([R6 share class / SMVSX](#)) and 10-year period ([Y share class / VSMIX](#)) in the Small-Cap Value Funds category.

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### **About Invesco Ltd.**

Invesco Ltd. is a global independent investment management firm dedicated to delivering an investment experience that helps people get more out of life. Our distinctive investment teams deliver a comprehensive range of active, passive, and alternative investment capabilities. With offices in more than 20 countries, Invesco managed \$1.84 USD trillion in assets on behalf of clients worldwide as of December 31, 2024. For more information, visit [www.invesco.com](http://www.invesco.com).

### **About LSEG Lipper Fund Awards**

For more than 30 years and in over 17 countries worldwide, the highly respected LSEG Lipper Awards have honoured funds and fund management firms that have excelled in providing consistently strong risk-adjusted performance relative to their peers and focus the investment world on top-funds. The merit of

the winners is based on entirely objective, quantitative criteria. This coupled with the unmatched depth of fund data, results in a unique level of prestige and ensures the award has lasting value. Renowned fund data and proprietary methodology is the foundation of this prestigious award qualification, recognizing excellence in fund management. Find out more at [www.lipperfundawards.com](http://www.lipperfundawards.com).

#### **LSEG Lipper Fund Award Disclaimer**

The LSEG Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The LSEG Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is a risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the LSEG Lipper Fund Award. For more information, see [lipperfundawards.com](http://lipperfundawards.com). Although LSEG makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, their accuracy is not guaranteed by LSEG Lipper.

#### **About Risk**

There is no assurance that any investment or strategy will achieve its investment objective. Funds are subject to market risk, which is the possibility that the market values of securities owned by these funds will decline and that the value of fund shares may therefore be less than what you paid for them. Fixed-income products are subject to risk, including, but not limited to, the effects of changing interest rates. Accordingly, you can lose money investing in these funds. Please be aware that these funds may be subject to certain additional risks. For complete details about the risks associated with the Fund, see the Funds' prospectuses.

Class Y shares are only available to certain investors. Class R6 shares are closed to most investors. Please see the prospectus for more details. Other share classes of the funds may have been ranked lower or higher. Rankings for other periods may be lower or higher.

Any reference to a ranking, a rating or an award provides no guarantee for future performance results and is not constant over time.

**Before investing, investors should carefully read the prospectus and/or summary prospectus and carefully consider the investment objectives, risks, charges and expenses. For this and more complete information about the fund(s), investors should ask their financial professional(s) for a prospectus/summary prospectus or visit [invesco.com/fund](http://invesco.com/fund) prospectus.**

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