

CORPORATE FACT SHEET

Expertise. Insights. Solutions.

Our Goal

We strive to keep our clients ahead of what's next by:

- Transforming uncommon insights into uncommon knowledge with a global research scope
- Navigating markets with seasoned investment experience and sophisticated solutions
- Providing thoughtful investment insights and actionable ideas

Whether you're an individual investor or a multi-billion-dollar institution, we seek to put our knowledge and experience to work for you.

Success Starts with Insight

We connect all the strengths of our firm, collaborating across platforms and teams to deliver impactful insights and innovative products. We know that better insights lead to better opportunities—anywhere in the world. So we've built a premier global research organization dedicated to connecting investment insights to potential investment success.

Experience Counts

We offer clients access to the high-caliber expertise, insights and solutions of our seasoned investment teams. They know global markets—and they know what investors need in seeking to stay ahead.

Proactive Investment Solutions

How can we help you? Our investment services range from equity and fixed income to alternatives and multi-asset solutions. Our teams take a disciplined approach to drive toward long-term success.

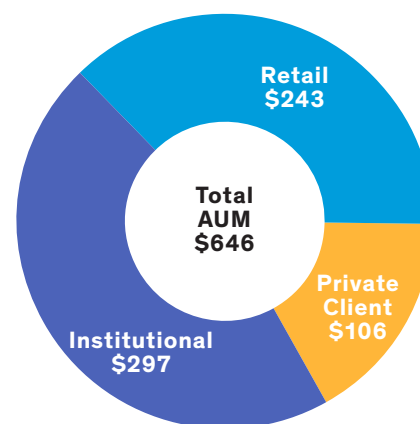
A Steadfast Partner

We serve all types of clients, helping them navigate a changing world:

- Corporations, Foundations and Endowments
- Central Banks, Governments and Sovereign Wealth Funds
- Financial Institutions (Banks, Brokerage, Asset Management and Insurance Firms)
- Intermediaries and Financial Advisors
- Private Investors and Families

ASSETS UNDER MANAGEMENT

In Billions
as of December 31, 2022



Connections Matter: Our Global Research Network

Atlanta	San Francisco	Paris
Austin	Santiago	Stockholm
Boston	São Paulo	Tel Aviv
Buenos Aires	Seattle	Zurich
Chicago	Tampa	
Cleveland	Toronto	Fukuoka
Dallas	Washington DC	Hong Kong
Denver	West Palm Beach	Kaohsiung
Houston		Melbourne
Los Angeles	Amsterdam	Mumbai
Mexico City	Copenhagen	Seoul
Miami	Dublin	Shanghai
Minneapolis	Frankfurt	Singapore
Nashville	London	Sydney
New York	Luxembourg	Taichung
Philadelphia	Madrid	Taipei
San Antonio	Milan	Tokyo
San Diego	Munich	

All data as of December 31, 2022

There can be no assurances any investment objectives will be achieved.

	Fundamental	Quantitative	Economists	Total Analysts
Equities	73	15	—	88
Fixed Income	34	7	6	47
Multi-Asset & Hedge Funds	—	35	—	35
Alternatives	51	—	—	51
Total	158	57	6	221