

# GLOBAL



## Our investment approach.

Focusing the world's leading managers and strategies on your goals—in an efficient, adaptive and diversified portfolio.



## OUR GLOBAL INVESTMENT APPROACH

# Designed to help you achieve your goals.

Our approach starts with you

- Understanding your investment goals
- Your views on risk and volatility
- Tax status, fee sensitivity, additional inputs

### 1. DESIGN PHASE

What balance of **asset classes** offers the highest likelihood of reaching your goals?

#### PRIMARY INPUTS



Goals, circumstances and preferences



Long-term forecasts



Medium-term views

110+

investment professionals

170+

asset class forecasts

5,000+

modeled scenarios

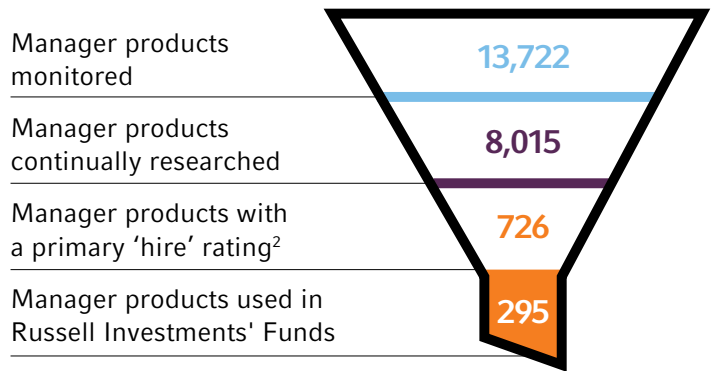
## What sets our approach apart?



### ASSET ALLOCATION

One of the pioneers in optimized asset allocation.

## FINDING THE WORLD'S LEADING MANAGERS AND STRATEGIES<sup>1</sup>



### 2. CONSTRUCT PHASE

What is a better way to **access** those asset classes?

#### PRIMARY INPUTS



Strategic beliefs



Manager research



Positioning strategies

**35+**

manager analysts

**2,500+**

meetings per year

**20+**

years of historical manager records

### 3. MANAGE PHASE

How should we **optimize** for your situation and the current environment?

#### PRIMARY INPUTS



Real-time portfolio analytics



Forward-looking views



Integrated trading

**24hr**

in-house trading desk

**US\$110b<sup>3</sup>**

traded in 2018

**47%<sup>4</sup>**

better trading price than average

ENVIRONMENTAL, SOCIAL AND GOVERNANCE CONSIDERATIONS CAN BE EMBEDDED WITHIN EACH STAGE OF OUR INVESTMENT PROCESS



#### MANAGER RESEARCH

Equipped to find outperforming managers.



#### EFFICIENT EXECUTION

Efficient execution, without sacrificing insight.

## Learn more about our approach at [russellinvestments.com/ca](https://russellinvestments.com/ca)

All data is for Russell Investments globally and is as of March 31, 2018

1 Manager research funnel data as of December 31, 2018.

2 The 'hire' rating is the highest rating given to investment managers based on Russell Investments manager research process.

3 Our methodology for calculation of our annual transition management values: Assets In Transition (AIT) represents the transition amount as the value of the initial portfolio assets in transition. Historically, the transition volume was represented by all transactions completed in the event, which included all buy and sell transactions of securities, derivatives and currencies. The new AIT methodology also removes internal Russell Investments Fund activity that is now managed by other teams with Russell Investments, which was included in the previous methodology.

4 Elkins McSherry data as of 31 December 2018. Highlight cost of global equity trading relative to full Elkins McSherry universe (both buy and sell side firms). Data is benchmarked against the "arrival price". Elkins McSherry is a data analytics firm that measures and tracks portfolio cost efficiency as a paid service for investment firms.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

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Please remember that all investments carry some level of risk, including the potential loss of principal invested. They do not typically grow at an even rate of return and may experience negative growth. As with any type of portfolio structuring, attempting to reduce risk and increase return could, at certain times, unintentionally reduce returns.

Diversification does not assure a profit or guarantee against loss in declining markets.

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