

Your trusted investment partner.

WHO WE HELP

We help investors of all shapes and sizes, across the globe. From large multi-national corporations to individual investors. For example:

- we advise large institutions like Boeing and Caterpillar on all aspects of their employee retirement plans,
- we provide global investment strength for distribution partners to compete in a competitive market,
- we help not-for-profit organizations like Thomas Jefferson University maintain their financial strength and meet their capital needs, and
- we help hundreds of thousands of individual investors, both directly and through personal financial advisors, reach their investment goals.



Representative client list as of 01/18. Please note that the logos shown above may be registered trademarks of the organisations represented. Clients may contract for a variety of services from Russell Investments. The identification of the clients listed does not constitute an endorsement or recommendation of Russell Investments' products or services by such client. For more information on the selection criteria, please refer to disclosure on reverse.

RUSSELL INVESTMENTS. A GLOBAL INVESTMENT MANAGER, DEDICATED TO IMPROVING PEOPLE'S FINANCIAL SECURITY.

GLOBAL INVESTMENT STRENGTH



Ranked as the largest manager of outsourced institutional assets in the world¹.

1936

Founded in Tacoma, WA

£205.1B

\$261.2B

€228.5B

Assets under management

360+

Investment professionals

22

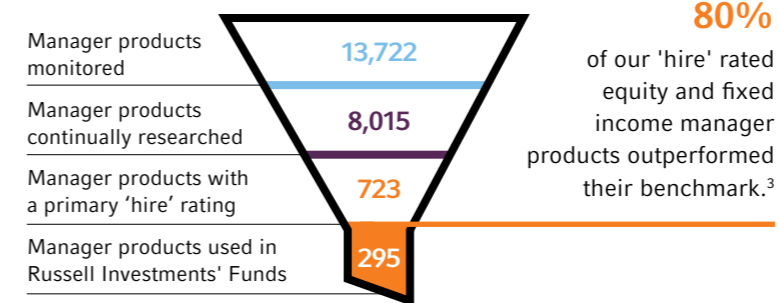
Offices worldwide

Data as of December 31, 2018.

OUR INVESTMENT APPROACH

Designed to help you achieve your goals.

MANAGER RESEARCH PROCESS²



80% of our 'hire' rated equity and fixed income manager products outperformed their benchmark.³

Our approach brings together some of the world's **leading investment managers and strategies**, in an agile and diversified portfolio, designed to help achieve your investment goals.

Our approach starts with you

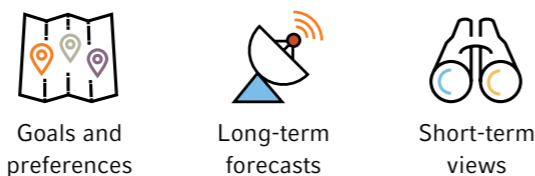
- Understanding your investment goals
- Your views on risk and volatility
- Tax status, fee sensitivity, other inputs

Then it's over to us, drawing on our global investment strength, to answer three critical questions.

1. DESIGN PHASE

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

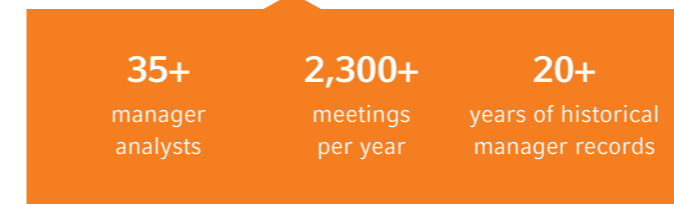
PRIMARY INPUTS



2. CONSTRUCT PHASE

What is a better way to **access** those assets?

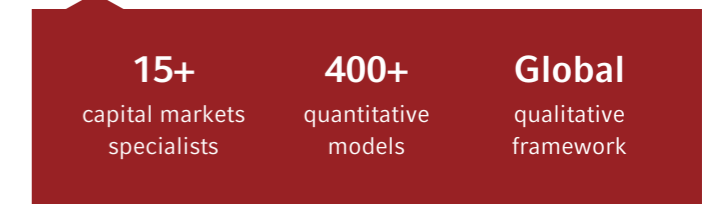
PRIMARY INPUTS



3. MANAGE PHASE

How should we **optimise** for the current environment?

PRIMARY INPUTS



What sets our approach apart?



Every decision we make is focused on achieving your investment goals.



Our portfolios embed extensive market, manager and investment insight.



Our multi-asset funds are managed in real time, seeking to capitalise on new opportunities and protect against emerging risks.



We broadly and intelligently diversify, drawing on unique return sources. We are not limited to in-house products or single strategies.



We focus on cost minimisation and tax-efficiency—without sacrificing the embedded insight, agility and diversification.

See how our approach can help
you reach your financial goals
at [russellinvestments.com/uk](https://www.russellinvestments.com/uk)

All data as at September 30, 2018 unless otherwise stated.

1 **Source:** CIO Magazine. (2018, February/March). “2018 Outsourced-Chief Investment Officer Survey”. Available at: <https://www.ai-cio.com/surveys/2018-outsourced-chief-investment-officer-survey>

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

3 **Source:** Data provided by internal Russell Investments applications. These applications are populated with data collected from individual managers by third party data collectors. The data is not thoroughly verified by Russell Investments and although deemed reliable, its accuracy is not guaranteed by Russell Investments or its affiliates. Most data is gross of advisory fees, but net of fee data is utilized where gross of fee data is not available.

Note: In some cases money managers do not provide data on their products, therefore a reader should be aware that the representations may be misleading; performance of hire lists may be higher or lower than represented. Hire ranked does not imply that such products have been placed in any of our funds or products.

Methodology: Quarterly performance data for hire ranked products is sourced for all approved coverage areas researched by Russell Investments. Each product in our hire lists is compared to the relevant Russell Investments’ assigned benchmark Index to generate a quarterly geometric excess return. Product level quarterly excess returns are compounded to calculate rolling 5 year excess returns. Hit rate calculations determine the percentage of hire rank products that have a positive excess return over each 5 year period. The percentage hit rate in all rolling periods is averaged to generate an average hit rate across all periods.

Representation: No client of Russell Investments has been able to achieve the represented performance due to the fact that the hire lists and universes are comprehensive composites that cannot be invested in directly. The hire lists and universes in Russell Investments’ research database that are used in this material (presentation) cannot be purchased or held by any client. These manager products are available for our consulting clients and internal portfolio managers to use in the construction of portfolios for our fund and separate account clients. Past performance is not indicative of future results.

Timing: Data is based on performance of hire ranks from 2001Q1 to 2018Q1. Manager products are included and excluded as our product ranks change over time; not all products are continually hire ranked over these indicated time periods. The information presented is for illustrative purposes only.

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