

# INVESTED IN OUTCOMES



EXPLORING OUR OUTCOME-ORIENTED  
APPROACH FOR INDIVIDUAL INVESTORS



All information contained in this report is correct at the time of production, is strictly for illustrative purposes only, and does not constitute investment advice. This report is designed for use by the financial adviser to assist in making a personal recommendation or managing investments for the underlying client.

## Invested in outcomes

At Russell Investments, we provide solutions that are designed with your goals in mind. Your adviser will help you tailor a portfolio that's right for you.

Our purpose is to improve the financial security of our clients. That's why we've developed investment solutions that are meticulously researched, diversified across a broad range of opportunities and dynamically managed to adapt to changes in the markets.

As at 31 December 2023, we managed approximately \$297.6 billion of investments on behalf of clients worldwide. Founded in 1936 in Washington State, USA, Russell Investments now services clients in 30+ countries and has offices in most of the major financial centres of the world. We work with individuals, companies, charities and government organisations to help them grow their wealth for the future.

Many of the world's most successful organisations depend on our expertise to help them build long-term financial security for their businesses and their employees. Our London office was opened in 1979 and we are recognised as a leader in multi-asset investment solutions for institutional clients – helping company pension schemes implement sophisticated investment solutions to meet the retirement needs of their members. Today, Russell Investments is able to use this expertise, developed through working with some of the most demanding and sophisticated institutional investors, for the benefit of individuals and their families.

### Russell Investments numbers



# 310

Investment professionals



# 1936

Founded Washington State



# 16

Offices worldwide\*



# \$297.6B

Assets under management



# \$1.0T

Assets under advice\*\*



**A single multi-asset solution can have:**

# 4

Core asset classes

# 14

Sub asset classes

# 50+

Specialist managers

Source: Russell Investments, as at 31 December 2023.

\*As at 1 December 2023.

\*\*As at 30 June 2023.

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## The more you know, the better your investment process

At Russell Investments, we like to think that we look further and deeper than most other investment companies in order to help us make wise investment decisions.

In fact, according to a FundFire survey, Russell Investments has the most thorough due diligence process in the investment consulting industry. There are two separate elements to our research:

### Capital markets research

This is our term for looking at what's going on generally around the world to help us discover more favourable investment opportunities.

Our global team of economists monitor investment markets around the world. They focus on macro-research, looking at economies, markets and industries and selecting those where we see the greatest opportunities for repeatable growth.

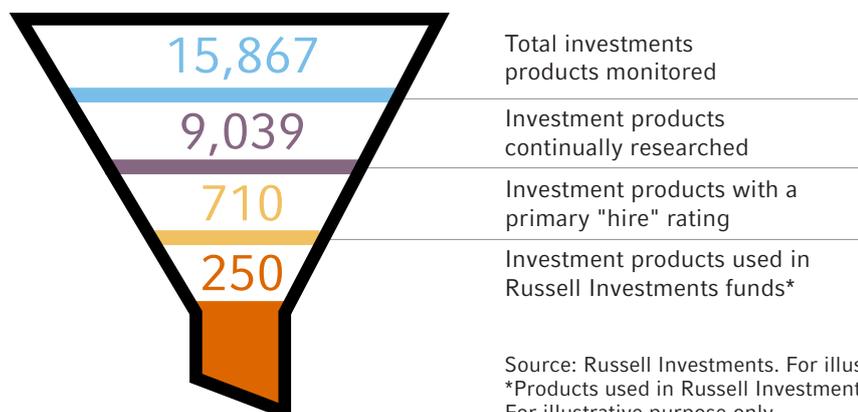
### Manager research

Looking at the performance, process and techniques used by different investment managers to help us discover some of the very best investment potential from around the world.

We employ 310 investment professionals dedicated to finding, assessing and monitoring investment management teams globally. Our analysts aim to select those with an exceptional ability, strong track record, robust processes and complementary skills.

## Russell Investments Manager Research Process

Russell Investments' process uses both qualitative and quantitative methods to pick some of the world's best investment managers. From a global pool of 15,867 investment manager products that we researched, only 250 were selected for specific assignments.



Source: Russell Investments. For illustrative purpose only.  
\*Products used in Russell Investments funds do not include Alternatives.  
For illustrative purpose only.  
Data as at 31 December 2023. These figures may vary from year to year.

## A research-driven approach to finding the best strategies

Russell Investments is recognised as a market leader in sophisticated multi-manager investing and we feel strongly that this strategy is suitable to meet the needs of a wide range of clients.

We apply a disciplined, research-driven approach which, we believe, allows our clients to benefit from more consistent, long-term performance with lower levels of risk than a single manager alternative.

We can help explain the benefits of a multi-manager approach to investment by comparing the difference in performance between the Olympic decathlon champion and the individual champions in each event.

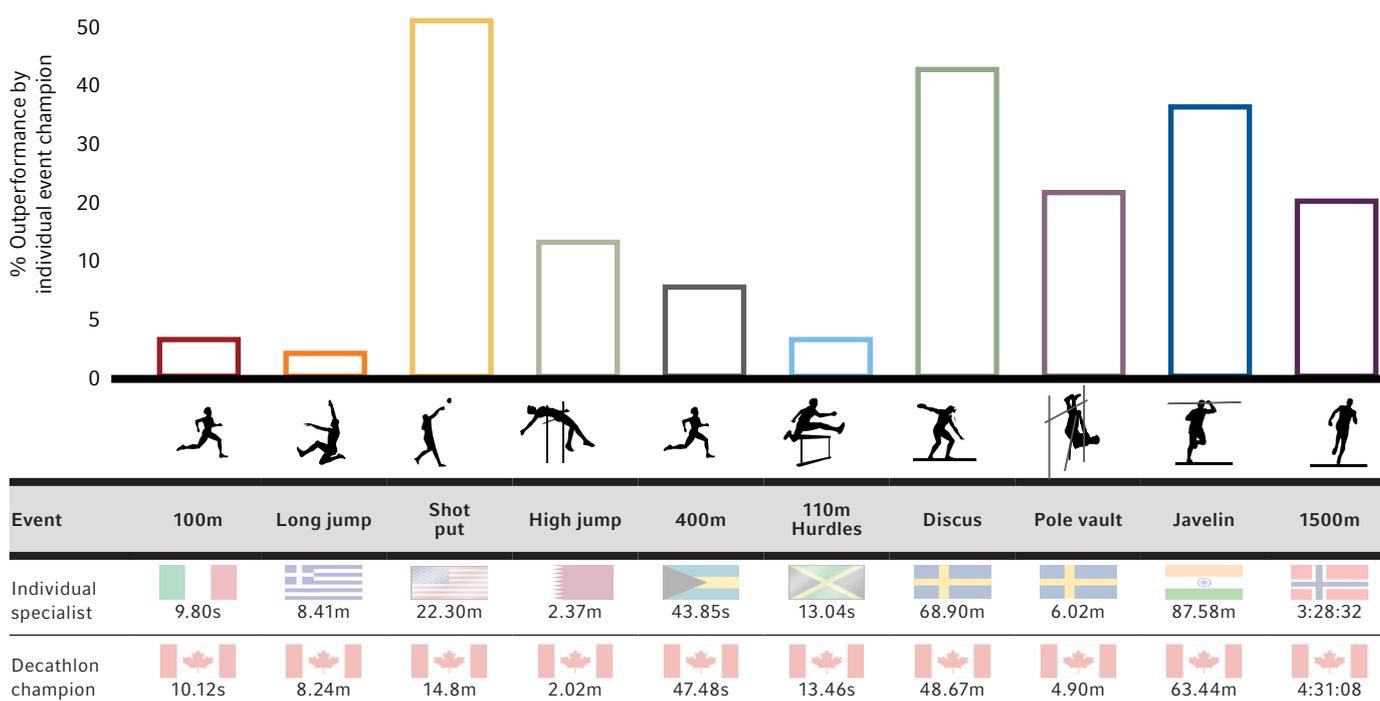
Whilst the decathlon champion is obviously an all-round athlete performing at an extremely high standard across ten different disciplines, they are frequently beaten by specialists in each of the individual events. The table below compares the performance of the decathlon gold medallist at the 2021 Tokyo Olympics against the individual gold medallists in each of the ten disciplines.

We think this sporting analogy helps explain Russell Investments' aim to identify the best investment managers from around the world.

While investing with a generalist investment manager who can provide exposure to different markets may give you a good return, finding the best individual performer in each of those markets may provide a much better return with lower risk.

And, just like the world of athletics, those individual champions can easily change from year to year. Russell Investments attempts to find the next champions through carefully monitoring a large number of investment managers from around the world.

### Specialists outperform generalists



Source: Russell Investments. For illustrative purpose only.

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## The power of personal advice

We appreciate the value of professional financial advice to individuals.

The global investment market can be difficult to understand even at the best of times. The choice of different products and services that are available can be overwhelming and your adviser is the best person to help you find the most suitable solution to meet your particular needs.

Only by undertaking a full and thorough review of your financial affairs, assessing your objectives and understanding your attitude to risk can your adviser make a meaningful assessment of your needs and requirements.

We can help by providing a robust and tested investment solution that aims to find some of the best opportunities in the world.

For this reason, Russell Investments only distributes its products through financial advisers. So if you would like to find out more about the specialist investment products available from Russell Investments, please contact your financial adviser.

## Round the world expertise

When you invest in Russell Investments, you're in good company. We direct the investments of some of the world's largest investors – many responsible for billion-dollar portfolios.



Representative client list as at 31 December 2023. Clients may use us for a variety of different services. The identification of these clients does not constitute an endorsement or recommendation of Russell Investments' products or services. Performance-based data was not used in selecting listed clients.

For more information please contact your financial adviser.

#### IMPORTANT INFORMATION

Unless otherwise specified, Russell Investments is the source of all data. All information contained in this material is accurate and current at the time of issue, and, to the best of our knowledge, accurate.

The value of investments and the income derived from them may go down as well as up and an investor may not receive back the amount originally invested.

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