

Personalized Small/Mid Cap SMA



Actively-managed equity portfolio from a blend of the world's leading managers



Investment objective

The Personalized Small/Mid Cap SMA seeks to provide long-term capital growth from U.S. small and mid-cap stocks while delivering customized investment outcomes by incorporating client-directed customization, e.g., tax management, Environmental, Social and Governance (ESG) considerations, and custom screens. The strategy is designed to outperform the Russell 2500™ Index over a full market cycle.

At-a-glance

Portfolio manager	Megan Roach, CFA® Nick Zylkowski, CFA®
Inception date	5/1/2007
Benchmark	Russell 2500™ Index
Minimum account size*	\$60,000-\$100,000
Typical holdings	80

*The minimum account size varies by platform.

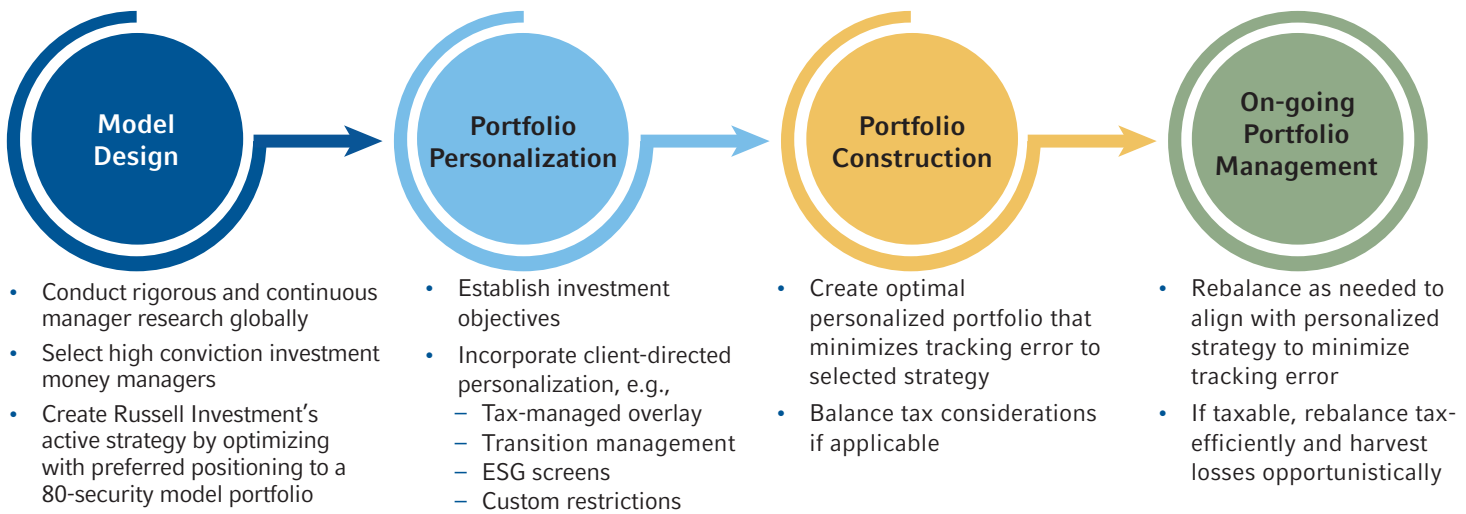
For whom is this SMA potentially suitable?

- Investors seeking a high level of personalization, e.g., tax management, ESG considerations, market exposure, return objectives.
- Investors seeking a professionally actively-managed portfolio focused on the U.S. small and mid-cap equity market.

Customizing the Personalized Small/Mid Cap SMA to your unique needs and preferences

	Ongoing tax management to maximize after tax returns
	Develop an optimal tax-efficient transition plan
	Align your ESG preferences and your investments
	Diversify a concentrated stock position
	Limit purchases in stocks or industries you already own

Russell Investments portfolio personalization process



Underlying managers* and their investment strategies

MONEY MANAGER	ROLE	YEAR ASSIGNED
Ancora Advisors, LLC	Market-Oriented	2019
BAMCO, Inc	Biotechnology	2022
Cardinal Capital Management, LLC	Value	2019
Copeland Capital Management, LLC	Market-Oriented	2019
DePrince, Race & Zollo, Inc.	Value	2022
Polen Capital Management, LLC	Growth	2020
Summit Creek Advisors, LLC	Growth	2019

*Managers listed above are current as of 1/13/2022. These money managers are unaffiliated with Russell Investment Management, LLC ("RIM") and have non-discretionary asset management assignments pursuant to which they provide a model portfolio to RIM representing their investment recommendations. RIM may change portfolio asset allocation at any time, including not allocating portfolio assets to one or more money manager strategies.

Ask your financial professional to learn more.

With Russell Investments' separately managed accounts, you can leverage a sophisticated investment approach and in-depth manager research backed up by Russell Investments' 50+ years of experience providing investment solutions to global institutional investors. Connect with your financial advisor to learn how you can benefit from this same investment approach and personalize your wealth-building strategy to meet your desired outcomes.

DISCLOSURES

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The Russell 2500™ Index measures the performance of the 2,500 smallest companies in the Russell 3000® Index, representative of the U.S. small to medium small capitalization securities market. Small capitalization (small cap) investments generally involve stocks of companies with a market capitalization based on the Russell 2000® Index. Investments in small cap, micro cap, and companies with capitalization smaller than the Russell 2000® Index are subject to the risks of common stocks, including the risks of investing in securities of large and medium capitalization companies. Investments in smaller capitalization companies may involve greater risks as, generally, the smaller the company size, the greater these risks. In addition, micro capitalization companies and companies with capitalization smaller than the Russell 2000® Index

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