



LET OUR EXPERTS BE YOUR EXPERTS

Enhance and scale your practice with Northern Trust's investment solutions, insights and expertise

WHY NORTHERN TRUST?

*Creating and managing wealth
for more than 130 years*

As a global investment firm with a history that dates back to 1889, we've honed our expertise over many market cycles — earning the confidence of investors worldwide.

Today, we apply our experience, insights and resources to help institutions and family offices, financial intermediaries and wealthy individuals pursue their most important goals.

Top Money Manager Rankings



RESOURCES TO BUILD AND GROW YOUR BUSINESS

Northern Trust Asset Management offers research, insights, solutions, and support to help our financial intermediary clients build and grow a successful investment practice. Contact your relationship manager to request access to our research and insights portal at NTAMInvestmentInstitute.com | NTAMII.com.



Past performance, and the above rankings, are not indicative of future results. Unless otherwise noted, rankings were published in Pensions & Investments (P&I) magazine's "2024 Special Report on the Largest Money Managers," 6/10/2024. All rankings above are based on total worldwide AUM of \$1.1T as of 12/31/2023. Rankings were calculated based on 411 investment management firms responding to P&I's online questionnaire. To qualify for inclusion in the rankings, each firm must manage assets for U.S. institutional tax-exempt clients, such as qualified retirement plans, endowments or foundations, and answer the minimum required questions

¹ As of September 30, 2024, updated quarterly. Source is Northern Trust Asset Management. Factor-Based Assets included in Quantitative Strategies totals as well, managed in tax-efficient accounts by the Tax-Advantaged Equity portfolio management team. Please see additional information at the end of this document.

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³ Morningstar as of 6/30/2024. Ranking based on total new assets among all US ETF providers. FlexShares was ranked 24 out of 450.

⁴ Northern Trust proprietary financial data, as of 12/31/2024.

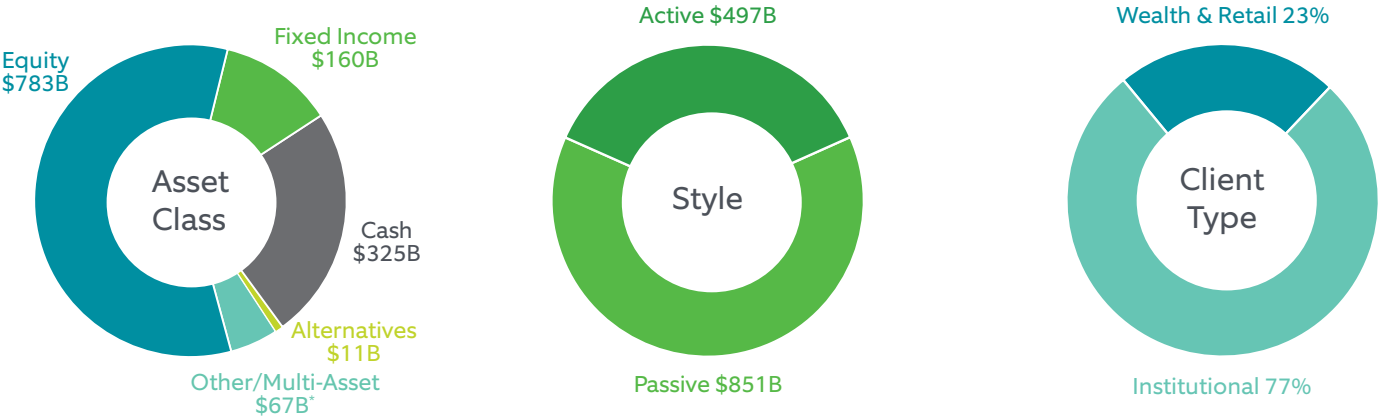
INVESTMENT SOLUTIONS

Tap into Northern Trust Asset Management’s global investment offering that serves some of the Forbes 400 Wealthiest Americans¹ and other sophisticated investors.

Expertise managing assets across the investment spectrum

\$1.3 TRILLION TOTAL ASSETS UNDER MANAGEMENT

AS OF 12/31/2024



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*Inclusive of Multi-Asset, Multi-Manager Solutions, and OCIO AUM. For the Northern Trust Asset Management entities included in AUM total, please see disclosure at the end of this document.

A global leader in asset management

Equity LONG HISTORY IN FACTOR-BASED INVESTING SINCE 1994	Fixed Income & Liquidity Solutions 40+ YEARS MANAGING TAXABLE & TAX-EXEMPT STRATEGIES	Multi-Manager 8TH LARGEST U.S. OUTSOURCING MANAGER "SPECIAL REPORT INVESTMENT OUTSOURCING," P&I 7/11/2024. BASED ON AUM AS OF 3/31/2024
5 SOUTH CAPITAL HEDGE FUNDS AND PRIVATE EQUITY SOLUTIONS	FlexShares® 25TH LARGEST ETF SPONSOR IN U.S. SOURCE: MORNINGSTAR & NTAM, BASED ON AUM AS OF 12/31/2024	Northern Funds & Northern Institutional Funds \$217 BILLION* DIVERSIFIED MUTUAL FUND FAMILY

* Data as of 12/31/2024.

RESEARCH & INSIGHTS

We seek to deliver our best thinking—relied upon by investment professionals and ultra-high-net-worth individuals globally—to empower risk-aware decision-making and the pursuit of investment goals.

ASSET ALLOCATION • Capital Market Assumptions • Asset Allocation Models	EQUITY RESEARCH • Equity Guidance List & Company Reports • Weekly Model Equity Portfolio	FIXED INCOME RESEARCH • Guidance List for Multiple Issue Types • Weekly Fixed Income Update	ECONOMIC RESEARCH • Weekly Economic Commentary • Global & U.S. Economic & Interest Rate Outlooks	BEYOND INVESTMENTS • Insights & Thought Leadership • Client Communications	EDUCATIONAL RESOURCES • Webinars • Training
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PORTFOLIO ADVISORY SERVICES

Consultative portfolio analysis and insights informed by firm-wide expertise across capital markets, portfolio construction and product fulfillment and supported by industry-leading tools.

CONSULTATIVE APPROACH

Delivering original insights and innovative portfolio solutions via a client-focused, collaborative approach

DEEP GLOBAL EXPERTISE

Portfolio design & product implementation backed by capital markets expertise and experienced, cross-asset practitioners

LEADING INDUSTRY & PROPRIETARY TOOLS

Multi-Asset Portfolio Analyzer, FactSet, Morningstar, Zephyr, Bloomberg, Aladdin

DEDICATED REGIONAL SUPPORT TEAM

Behind our offering is a globally diverse team of investment professionals whose expertise spans global markets, economies, investment products, and more.



LET OUR EXPERTS BE YOUR EXPERTS

Contact your **Northern Trust Relationship Manager** or NTAMISolutionsExperts@ntrs.com to learn more about how Northern Trust Asset Management can help you advance your investment practice, and to gain access to our research and insights portal at NTAMInvestmentInstitute.com | NTAMII.com.

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Figures presented also include factor-based assets in Quantitative Strategies managed in tax-efficient accounts by the Tax-Advantaged Equity portfolio management team. Products and services provided by subsidiaries of Northern Trust Corporation may vary in different markets and are offered in accordance with local regulation. For more information, read our legal and regulatory information about individual market offices (available at northerntrust.com/disclosures). **Past performance and rankings are not indicative of future results.**

About Northern Trust Asset Management

Northern Trust Asset Management is composed of Northern Trust Investments, Inc., Northern Trust Global Investments Limited, Northern Trust Fund Managers (Ireland) Limited, Northern Trust Global Investments Japan, K.K., NT Global Advisors, Inc., 50 South Capital Advisors, LLC, Northern Trust Asset Management Australia Pty Ltd, and investment personnel of The Northern Trust Company of Hong Kong Limited and The Northern Trust Company.

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