Firm Overview

Experience is a Clear Advantage
ClearBridge Investments is a well-established global investment manager with a legacy dating back over 50 years. Our mission is to deliver consistently superior risk-adjusted investment performance. We pursue this goal through a combination of active, research-driven, fundamental investing and the insights of our veteran portfolio managers, some of whom have been managing the same portfolios for decades. While our managers work within a disciplined investment framework, they are encouraged to follow their own distinct management styles.

In a world that is too often focused on short-term results, this combination of primary research and the insight of our portfolio managers helps ClearBridge Investments remain committed to delivering the long-term results that our clients have grown to expect.

Consistent Asset Growth Across a Diversified Asset Base

ClearBridge Total Assets Under Management: $154.6 Billion
**Client-Focused Solutions**
Over time, ClearBridge has grown by focusing on areas of proven expertise. Our long-tenured portfolio managers and fundamental research team focus on building equity portfolios for clients who seek investment strategies that deliver income solutions, high active share or low volatility.

**Assets by Client Objective**

- **High Active Share**
  - Aggressive Growth
  - All Cap Growth
  - All Cap Value
  - Global Growth
  - International Growth
  - International Value
  - International Small Cap
  - Large Cap Growth
  - Mid Cap
  - Mid Cap Growth
  - Multi Cap Growth
  - Small Cap
  - Small Cap Growth
  - Small Cap Value
  - SMID Cap Growth
  - Sustainability Leaders
  - Value Equity

- **Low Volatility**
  - $16.2 Billion

- **Income Solutions**
  - $30.2 Billion

**Assets by Client Type**

- **Institutional**
  - $47.8 Billion

- **Intermediaries**
  - $102.3 Billion

- **Offshore***
  - $4.5 Billion

**High Active Share**

- Dividend Strategy
- Energy MLP
- Tactical Dividend Income
- U.S. Convertibles

**Low Volatility**

- Appreciation
- Large Cap Value

*Represents funds only – Institutional includes offshore AUM of approximately $1.3 billion.