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: $140.2 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.

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**Assets by Client Objective**

- **High Active Share**
  - $99.3 Billion
- **Income Solutions**
  - $25.7 Billion
- **Low Volatility**
  - $15.2 Billion

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**Assets by Client Type**

- **Intermediaries**
  - $92.0 Billion
- **Institutional**
  - $43.4 Billion
- **Offshore**
  - $4.8 Billion

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**High Active Share**

- Aggressive Growth
- All Cap Growth
- All Cap Value
- 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

**Income Solutions**

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

**Low Volatility**

- Appreciation
- Large Cap Value