

# PERSONALIZED DI ALL CAP SMA

EQUITY INDEX STRATEGY DESIGNED TO OFFER A HIGH LEVEL OF PERSONALIZATION



## Investment objective

The Personalized Direct Indexed (DI) All Cap SMA seeks to provide long-term capital growth from U.S. stocks while delivering personalized investment outcomes by incorporating client-directed customization, e.g., tax management, and custom screens. The strategy is designed to track the performance of the Russell 3000® Index.






## At-a-glance

Portfolio manager	Rino Faustini Nick Zylkowski, CFA®
Inception date	3/1/2021
Benchmark	Russell 3000® Index
Investment minimum	\$250,000
Typical holdings range	300–600

## For whom is this SMA potentially suitable?

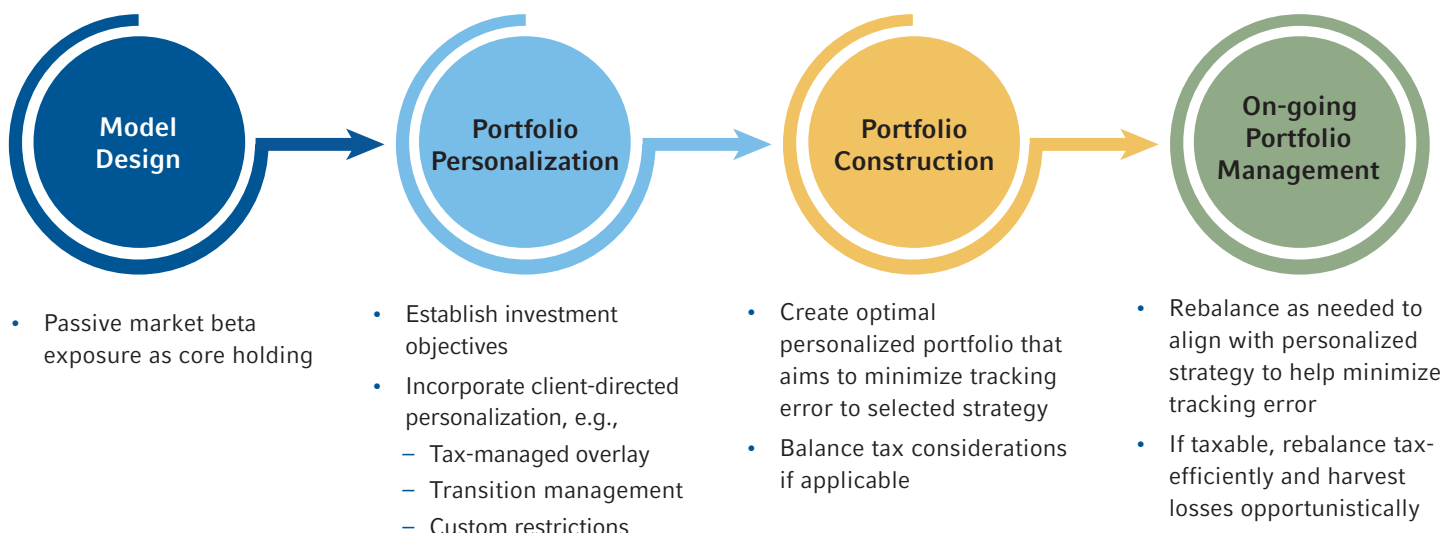
- Investors seeking a high level of personalization, e.g., tax management, category and theme-based restrictions, market exposure, return objectives.
- Investors seeking a professionally managed index portfolio at an attractive cost.

## Customizing the Personalized DI All Cap SMA to your unique needs and preferences

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

Investment and Insurance Products: •Are not FDIC or any other Government Agency Insured •Are not Bank Guaranteed •May Lose Value

## Russell Investments portfolio personalization process



## 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.

### IMPORTANT RISK DISCLOSURES

Personalized DI All Cap SMA is a product of Russell Investment Management, LLC ("RIM") and offered through RIM's Personalized Managed Accounts ("PMA") program. It represents a direct indexed portfolio provided by RIM. PMA is a separately managed account program of individually owned securities that can be tailored to meet investor's investment objectives. RIM offers diversified, single or multi-asset managed accounts that can be customized to the investor's investment objectives, circumstances and preferences, such as (but not limited to), market exposure, risk management, tax management, category and theme-based restrictions, and return objectives. Excluding any allocations to pooled investment vehicles, if any, each investor's account is managed separately from other investor accounts, allowing for a personalized experience to deliver unique investment outcomes.

Diversification and strategic asset allocation do not assure a profit or guarantee against loss in declining markets. Please remember that all investments carry some level of risk. There are no assurances that the objectives stated in this material will be met. Investment in one or more separately managed accounts is not a complete investment program and involves risk; principal loss is possible. The principal value of the account is not guaranteed at any time.

Investments in small cap, micro cap, and

companies with capitalization smaller than the Russell 2000® Index, are subject to the risks of common stocks, may experience considerable price fluctuations and are more volatile than large company stocks. Generally, the smaller the company size, the greater the risks.

The decision to use PMA in investors' portfolios and related investment advice are provided through financial advisors and other financial intermediaries that are independent of RIM and its affiliates. Investors should consult their financial advisor to determine which services and programs are appropriate to meet their investment objectives.

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Russell 3000® Index: Index measures the performance of the largest 3000 U.S. companies representing approximately 98% of the investable U.S. equity market.

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MSCI World ex USA Index: Index captures large and mid cap representation across 22 of

23 Developed Markets countries—excluding the United States. With 1,008 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.

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