

An OCIO solution



Outsourced CIO for DC plans

Russell Investments is dedicated to helping your Defined Contribution (DC) plan improve retirement outcomes for your participants. Our experience and depth of resources in consulting, investment management, manager research, and portfolio implementation enable us to provide a wide range of innovative outsourced CIO (“OCIO”) solutions for your DC plan.

Customizable DC solutions

A complete range of fiduciary options

	Manager Research	Investment Management	Glide Path Methodology	Participant Communications	Recordkeeper Search
Complete Fiduciary Solutions	✓	✓	✓	✓	✓
LifePoints Target Date Funds	✓	✓	✓	✓	
Custom Glide Path Management		✓	✓	✓	
Standalone Multi-Asset Options	✓	✓			
Investment Consulting	✓				

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Increasing levels of fiduciary control and accountability

Investment management

Since 1980, we’ve been hiring some of the best managers identified through our research and packaging them in our investment funds. We closely monitor their ongoing performance, making changes when necessary.

We can also handle all aspects of your performance reporting and administration, as well as trust and custodial services either on an asset class by asset class basis, or as part of an OCIO solution.

By the numbers

\$355b	\$150b[†]	\$26b	\$1.7b	64
Global assets under management	DC assets under advisement, global	DC assets under management, U.S.	Custom glide path assignments, U.S.	Institutional DC clients worldwide

Source: Russell Investments. All data as of June 30, 2025, unless otherwise stated. [†]As of December 31, 2024. Numbers listed above represent the firms’ aggregate DC business.

Our research advantage

Our manager research, asset allocation technology, portfolio design and capital markets research are at the forefront of the investment industry, including:



326

Our professionals are directly involved in our investment process.

117

managers and analysts actively manage portfolios worldwide.



9,379

traditional and alternative investment products continuously researched.

249

investment products used in our funds.*

Data as of 6/30/2025,

*Products used in Russell Investments funds do not include alternatives.

Proven leaders



A Top Global Outsourcer in 401(k), 403(b) or other DC¹



A Leading Consultant in Worldwide Assets²



A Leading OCIO Provider³

Investment solutions

A well-designed DC plan will typically offer a combination of default investments for participants who wish to leave the management and monitoring of their portfolios to a professional along with other core investment options for those participants who prefer to be more personally involved. At Russell Investments, we offer both.

- **Default options:** We offer several default investment options to meet the unique needs of your plan, including the LifePoints® Institutional Target Date Strategy Funds, and custom Target Date Funds.
- **Individual funds:** We also offer a large selection of individual, institutionally-priced multi-asset funds in both traditional asset classes and real asset solutions for an efficient core investment menu.

Consulting

For over 50 years, our global network of consultants and research analysts have helped institutional investors maintain efficient and effective investment programs. We offer:

- Strategic advice customized around your DC plan's goals,
- Investment policy refinement and asset class strategy modeling,
- Capital markets insights, asset manager research, and
- Efficient implementation of investment strategies.

If you'd like to learn more about how we can work together, please reach out. We'd love to connect with you.

Where to next?



Call Russell Investments at **855-771-2966**
or visit russellinvestments.com/DC

Important Disclosures - For institutional use only

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Award information: 1. For the 13th year in a row (2012-2024), Russell Investments was ranked as a top global manager of institutional outsourced assets under management (AUM) from its fully discretionary clients in CIO Magazine's annual "Outsourced-Chief Investments Officer (OCIO) Survey." Notably, in CIO's "2024 OCIO Survey", which included 26 firms, Russell Investments placed first among the global managers in Healthcare and in the top 10 for Defined Benefit and 401(k), 403(b) or other DC outsourced assets (as of December 31, 2023). Using quantitative data reported as of December 31 of the previous calendar year. The survey includes a varied number of firms, differentiated by year: 2024 (26 firms), 2023 (47), 2022 (45), 2021 (47), 2020 (50), 2019 (35), 2018 (34), 2017 (53), 2016 (53), 2015 (49), 2014 (36), 2013 (29), and 2012 (24). We paid this publication a fee for licensing usage and rights of the award logo/badge. 2. For the 16th year in a row (2009-2024), Russell Investments was globally ranked as one of the top 12 largest consultants in worldwide institutional assets under advisement (AUA) in Pensions & Investments' (P&I) annual survey. Using quantitative data reported as of June 30 for each respective year, the survey includes a varied number of firms, differentiated by year: 2024 (58 firms), 2023 (61), 2022 (66), 2021 (71), 2020 (80), 2019 (88), 2018 (92), 2017 (94), 2016 (104), 2015 (108), 2014 (110), 2013 (117), 2012 (115), 2011 (109), 2010 (104), and 2009 (107). We paid this publication a fee for licensing usage and rights of the award logo/badge. 3. For the 15th year in a row (2011-2025), Russell Investments was globally ranked among the leading institutional outsourced chief investment officer (OCIO) managers in Pensions & Investments' (P&I) annual

survey. P&I's 2025 ranking was based on worldwide outsourced assets under management from 54 firms as of March 31, 2025. Using quantitative data reported as of March 31 for the respective year, except for 2012 which uses data as of June 30. The survey includes a varied number of firms, differentiated by year: 2025 (54 firms), 2024 (55), 2023 (57), 2022 (55), 2021 (59), 2020 (62), 2019 (69), 2018 (68), 2017 (67), 2016 (76), 2015 (83), 2014 (71), 2013 (68), 2012 (51), and 2011 (31). We paid this publication a fee for licensing usage and rights of the award logo/badge.

See more information about awards here:

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All data current as of 6/30/2025 unless otherwise noted.

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Capabilities

Our DC clients benefit from our depth and breadth of capabilities.



Market forecasts, prepared by our **CAPITAL MARKETS INSIGHTS** professionals, are used as inputs in our strategic **ASSET ALLOCATION** process.



Insights from our **MANAGER RESEARCH** team help us better understand the likely performance behavior when pairing various managers.



Our target date **IMPLEMENTATION** and rebalancing process benefits greatly from the experience of Russell Investments' implementation services, one of the industry's largest transition managers.

Invest without boundaries™