

Investnet & Investment Advisor Select Finalists for Annual Asset Manager & Strategist Awards

Best-In-Class Portfolio Managers to be Honored During Presentation of
Investnet Advisor Summit On-Demand



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May 13, 2020, 08:32 ET

CHICAGO, May 13, 2020 /PRNewswire/ -- Investnet, Inc. (NYSE: ENV) and *Investment Advisor* magazine have announced their list of finalists for the 2020 Asset Manager and Strategist of the Year Awards. Now in its 16th year, the awards program recognizes high-conviction portfolio managers that exemplify investment management best practices.



2020 Asset Manager Award

To be eligible for the Asset Manager and Strategist of the Year Awards, a manager must have at least three years of experience and \$200 million in assets under management. The manager's strategy must also be open to new investors, and broadly available on the

Investnet platform.

As in previous years, finalists were chosen from hundreds of portfolio managers in each category using the systematic, proprietary, and multi-factor evaluation methodology developed by Investnet | PMC (<https://www.investpmc.com/>), Investnet's Portfolio Management Consultants group. A broad spectrum of qualitative and quantitative criteria are considered during the selection process, including performance, investment process and style, composite, firm profile, tax efficiency, and customer service.

"We are proud to team up once again with *Investment Advisor* to shine a spotlight on managers and strategists that truly go above and beyond for investors," said **Tim Clift, Chief Investment Strategist of Investnet | PMC**. "All of this year's award finalists have shown that active management can reap significant rewards for investors. Highlighting what drives their performance is a vital service for the asset management industry."

In addition to the seven categories, an overall Manager of the Year exemplifying investment management excellence will be chosen from among the winners. All award recipients will be featured in the July 2020 issue of *Investment Advisor*.

Award winners are usually announced during the Investnet Advisor Summit, which has been canceled this year due to health and safety concerns stemming from the COVID-19 pandemic. However, Investnet is planning to provide financial professionals with digital access to Advisor Summit content on-demand. This year's Asset Manager and Strategist of the Year Award winners will be announced during the digital on-demand presentation of Investnet Advisor Summit content. For more information, please visit <https://www.investnet.com/advisorsummit/>.

"Our readers are keen to learn more about strategies and solutions that can help their clients grow and protect their wealth, especially at a time like this," said **Janet Levoux, Editor-in-Chief of Investment Advisor**. "Investnet | PMC's analysis identifying the top managers and strategies in an extremely crowded field is important for enabling advisors and their clients to navigate market volatility. We join our partners at Investnet in congratulating this year's award finalists, and we are eager to bring their insights to the attention of the broader industry."

Finalists for the 2020 Asset Manager and Strategist of the Year Awards are:

Large Cap Equity (two awards)

The Alley Co.—Alley Dividend Portfolio

Brown Advisory—Large Cap Growth

Dana Investment Advisors—Large Cap Equity

Parnassus Investments—Core Equity Fund

Small/SMID/Mid Cap (two awards)

- **Mid Cap**

EARNEST Partners—Mid Cap Core

Wells Fargo Asset Management—Special Mid Cap Value

- **Small and SMID**

Fuller & Thaler Asset Management—Behavioral Small-Cap Equity

The London Co.—SMID Managed Account Strategy

Global, International, and Emerging Market (one award)

ClearBridge Investments—International Growth ADR SMA

Columbia Threadneedle Investments—Columbia Emerging Markets Fund

Epoch Investment Partners—Epoch Non-US ADR Strategy

Fixed Income (one award)

GW&K Investment Management—Enhanced Core Bond Strategy

T. Rowe Price—Bank Loan

Impact (one award)

Boston Common Asset Management—Boston Common International Equity

Brekinridge Capital Advisors—Intermediate Sustainable Tax Efficient SMA

Liquid Alternatives (one award)

BlackRock—BlackRock Strategic Income Opportunities Fund

Eaton Vance—Global Macro Absolute Return Strategy

Strategist (one award)

Capital Group—American Funds Core Models

New Frontier Advisors—New Frontier Global Strategic ETF Portfolios

The name of the awards, formerly known as the Separately Managed Account (SMA) Manager and Strategist of the Year Awards, was changed in 2018 to better reflect the scope of the asset management community, and allow the addition of more categories.

About Investnet

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet's unified technology empowers enterprises and advisors to more fully understand their clients and deliver actionable intelligence that drives better outcomes and improves lives.

Investnet Wealth Solutions enables enterprises and advisors to better manage client outcomes and strengthen their practices through its leading Wealth Management Operating System and advanced portfolio solutions. Investnet | Tamarac provides portfolio management, reporting, trading, rebalancing and client portal solutions for registered investment advisers ("RIAs"). Investnet | MoneyGuide provides goals-based financial planning applications. Investnet Data & Analytics enables innovation and insights through its Investnet | Yodlee data aggregation platform.

More than 103,000 advisors and more than 4,900 companies including: 16 of the 20 largest U.S. banks, 46 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs and hundreds of internet services companies, leverage Investnet technology and services. Investnet solutions enhance knowledge of the client, accelerate client onboarding, improve client digital experiences and help drive better outcomes for enterprises, advisors and their clients.

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With a qualified circulation of 80,000, *Investment Advisor* is now in its 40th year of serving independent and independent-minded investment advisors and financial planners across the U.S. through its monthly magazine and online at *ThinkAdvisor.com*. The Investment Advisor Group of ALM consistently produces the premier digital and print news, analysis and resources that the community of professional financial advice-givers needs to serve clients, stay compliant and maximize growth. For more information about *Investment Advisor* and *ThinkAdvisor*, click [here](#).

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Media Contact

Dana Taormina
JConnelly for Envestnet
973.850.7305
envestnetpr@jconnelly.com

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