Who Is Clark Capital?

1986 Year Founded	$36.2B AUA*	25 Investment Professionals
100% Family and Employee Owned	**Committed to Asset Management Excellence for Better Outcomes**	22.4 Investment Team Average Years Experience
145 Employees	3x Winner **2020-2021-2022** Asset Manager of the Year**	10.1 Investment Team Average Years Working Together

*As of 3/31/2024, includes sub-advised assets and assets under advisement.
**Money Management Institute (MMI) and Barron's. Past performance does not guarantee future results. The ranking shown above is not indicative of future performance and may not be representative of any one client's experience because it reflects an average of, or a sample of all, the experiences of the adviser's clients. Please see attached disclosures.

Our Approach

Our mission is to provide advisors with investment strategies that can help clients stay on track to reach their long term goals. We do this by creating investment strategies designed to help clients remain committed to their individual financial plans.

EXPERIENCE

Our Portfolio Managers have an average of 28 years of industry experience, helping you expand the expertise you provide your clients.

DISCIPLINE

Using a combination of fundamental and quantitative research, our investment approach is unemotional and repeatable.

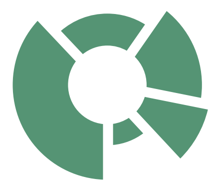
PARTNERSHIP

We provide a truly collaborative approach to portfolio construction, taking the time to listen, learn, and help investors achieve their goals.

Our Philosophy

We believe that investors are best served through a diverse selection of asset classes and investment approaches that closely align with their investment goals.

Our investment philosophy is grounded in three core principles: meaningful diversification, opportunistic asset allocation, and risk management:



MEANINGFUL DIVERSIFICATION

We incorporate multiple global asset classes and methodologies into a portfolio that is aligned to the client's life goals.

OPPORTUNISTIC ASSET ALLOCATION

We utilize an active approach to asset allocation that allows us to take advantage of growth opportunities in a rapidly changing global marketplace.

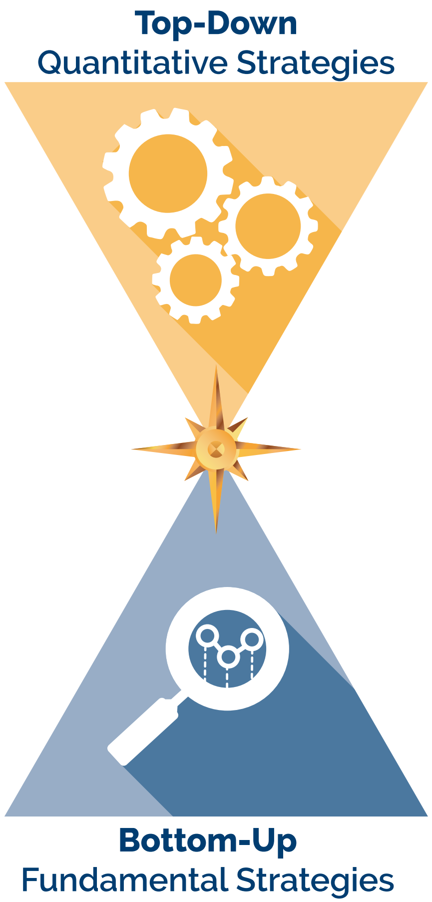
RISK MANAGEMENT

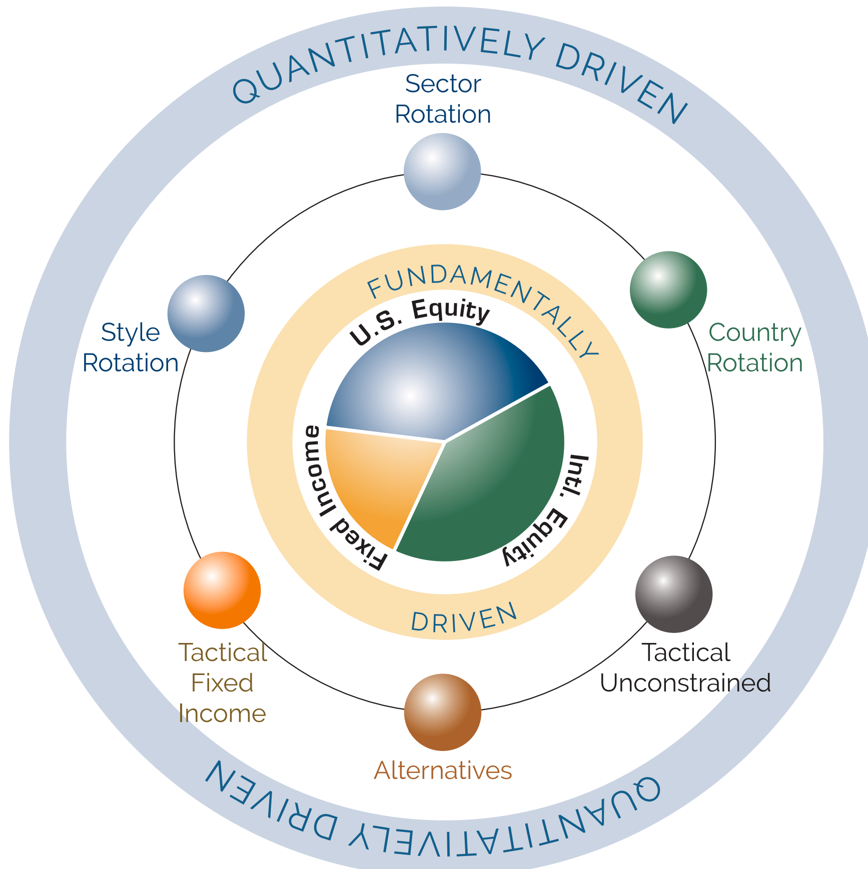
We believe that personalized risk management can help clients remain committed to reaching their long-term goals, regardless of the ups and downs of the markets.

Investment Process

Our goal is to provide meaningful diversification through a bottom-up, fundamental investment process combined with a top-down, quantitative approach.

In our fundamental, bottom-up strategies, portfolio managers utilize an active approach to individual security selection. Each stock and bond is carefully analyzed by our team of investment professionals and handpicked for each portfolio.





In our quantitative, top-down strategies, portfolio managers utilize a disciplined, relative strength approach. This relative strength approach drives our tactical shifts in the portfolios that seek opportunities and guard against undue risks.

A Commitment to Asset Management Excellence

Clark Capital is honored to be recognized by leading industry publications and institutions for our dedication to serving advisors and their clients.

2020 2021 2022 INDUSTRY AWARDS WINNER

MONEY MANAGEMENT INSTITUTE | BARRON'S

Asset Manager of the Year
(AUM between $25-$100 billion)

2021 WINNER
REFINITIV LIPPER FUND AWARDS
UNITED STATES

2020 WINNER
REFINITIV LIPPER FUND AWARDS
UNITED STATES

2018
THOMSON REUTERS
LIPPER FUND AWARDS
UNITED STATES

2023
BEST PLACES TO WORK
BPtW
PHILADELPHIA BUSINESS JOURNAL

2022
BEST PLACES TO WORK
BPtW
PHILADELPHIA BUSINESS JOURNAL

2021
BEST PLACES TO WORK
BPtW
PHILADELPHIA BUSINESS JOURNAL

2017
SMA MANAGERS of the YEAR

Informa Investment Solutions
Financial intelligence | informa
PSN
Top Guns Award
Manager of the Decade
4Q 2018

Informa Investment Solutions
Financial intelligence | informa
PSN
Top Guns Award
Manager of the Decade
4Q 2017

2020
BEST PLACES TO WORK
BPtW
PHILADELPHIA BUSINESS JOURNAL

2019
BEST PLACES TO WORK
BPtW
PHILADELPHIA BUSINESS JOURNAL

Please see Important Disclosures for more information about the awards and recognition shown.