New Website Preview | RS Investments

Financial Advisors + Global

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Our Firm | Contact Us | Careers

1

RS|investments

Financial Advisors ▼

5 6

Log In Need an online profile? Register

Multiple investment disciplines. Distinct and specialized teams.
Serious investing 7

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Registered Investment Advisors & Research Analysts 9

Institutions ▼ 10

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Individual Investors 12

Unique Research Insights

Research Insight Title 17

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More

Research Insight Title

Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi
More

Research Insight Title

Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi
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Timely Market Commentaries

Commentary Title 19

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Commentary Title

Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi
More

Research Insight Title

Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi
More

21 22 23 24 25 26

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NOTES

Menu displays below when selecting Institutions

Select a type...

- > Asset Consultants & Advisory Research 13
- > Corporations, Public Funds & Taft-Hartl 14
- > Endowments, Foundations & Family Off 15
- > Sub-Advisory 16

1. Logo displays on non-channelized homepage, as well as FA, RA, and Individual homepages. It will be replaced by RS Investments logo on Institutional and DCIO pages.
2. Links to Our Firm
3. Links to Contact Us
4. Links to Careers
5. Links to Log In. Displays if user is not logged in.
6. Links to Create Online Profile.
7. Links to Our Firm
8. Links to FA homepage (not logged in)
9. Links to RIA/RA homepage (not logged in)
10. On click, menu opens with four options.
11. Links to DCIO homepage (not logged in)
12. Links to Individual homepage (not logged in)
13. Links to Institutional homepage (not logged in)
14. Links to Institutional homepage (not logged in)
15. Links to Institutional homepage (not logged in)
16. Links to Institutional homepage (not logged in)
17. Links to Research Insight detail/PDF
18. Links to Research Insight detail/PDF
19. Links to Commentary detail/article
20. Links to Commentary detail/article
21. Link is inactive on current page. On all other non-logged in pages, links to non-logged in homepage of current channel. On all logged-in pages, links to logged in homepage of current channel.
22. Links to Privacy Policy PDF in new window
23. Links to Glossary
24. Links to Careers
25. Links to Press
26. Links to Continuity
27. Copyright and Disclaimer copy displays on all pages.

Contact Us | Careers

1 RS|investments

Financial Advisors 2

Ticker or Keyword | Search 3

Log In Need an online profile? Register

Home 4 | Funds & Performance 5 | Research Insights 6 | Practice Matters 7 | Forms & Literature 8 | Our Firm 9

Benefits of creating an online profile

- Lorem ipsum
- Lorem ipsum
- Lorem ipsum
- Lorem ipsum
- Lorem ipsum 10

Create a Profile>

A

Rotating feature area. Lorem ipsum

Lorem Ipsum > 11

Are your small cap growth fund recommendations delivering for your clients?

LEARN MORE

Explore Our Funds

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Equity-US 13

International Equity 14

Fixed Income 15

Alternatives 16

Featured Funds

Introductory statement...volupta simagni musaniet dis eosam simagni musaniet dis eosam
Featured Fund 17

Introductory statement...volupta simagni musaniet dis eosam simagni musaniet dis eosam
Featured Fund

Introductory statement...volupta simagni musaniet dis eosam simagni musaniet dis eosam
Featured Fund

Introductory statement...volupta simagni musaniet dis eosam simagni musaniet dis eosam
Featured Fund

18 **New Research Insights** 19

Lorem Ipsum
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Lorem Ipsum
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Lorem Ipsum
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Press / In the News 20

News Article
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

News Article
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

News Article
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Home | Privacy Policy | Glossary | Careers | Press | Business Continuity

NOTES

1. Logo displays on all FA pages. It is inactive on FA homepages (not logged in and logged in) and links to the this page or FA homepage (logged in) on all other pages.

2. Links to Individual homepage (not logged in.

3. Enter fund ticker and click search to display fund overview page. Enter any other search term and click search to display Search Results

4. Link is inactive on this page. On all other pages, links to FA homepage (not logged in).

5. Links to Funds & Performance

6. Links to Research Insights

7. Links to Practice Matters

8. Links to Forms & Literature

9. Links to Our Firm

10. Links to Create Online Profile

11. Rotating feature area may contain up to 3 promotions. Text and image link to target page.

12. Fund feature area defaults to Featured Funds. Selected item is highlighted and determines funds displayed on the right.

13. Click to highlight and display related funds on the right

14. Click to highlight and display related funds on the right

15. Click to highlight and display related funds on the right

16. Click to highlight and display related funds on the right

17. Links to Fund Overview

18. Lock icon displays indicating inactive link and document inaccessible to non logged in users

19. Links to Research Insight detail/PDF

20. Links to article

A. Growth micro- site content:
Five Big Questions for Small Cap Growth Investors eBook Login

Contact Us | Careers

RS|investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith 1 | Sign Out 2 (2) 3

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

4 I want to....

5 Manage My Online Profile & Subscriptions

6 Speak with My Sales Team

7 View My Funds

8 View My Bookmarks

9 Get Fund Performance Information

10 Order Literature

11 Get Sales Ideas to share with my Clients

12 Get Practice Building content for my education

RSM Marketing 13

Rotating feature area. Lorem ipsum

Lorem Ipsum >

Explore Our Funds

Featured Funds

Equity-US 14

International Equity

Fixed Income

Alternatives

- RS Partners Fund
- RS Value Fund
- RS Large Cap Alpha Fund
- RS Investors Fund
- RS Capital Appreciation Fund
- RS Small Cap Growth Fund
- RS Select Growth Fund
- RS Mid Cap Growth Fund
- RS Growth Fund
- RS Technology Fund
- RS Small Cap Equity Fund
- RS S&P 500 Index Fund

New Research Insights

Lorem Ipsum
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Lorem Ipsum
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Lorem Ipsum
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Press / In the News

News Article
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

News Article
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

News Article
Introductory statement...volupta simagni musaniet dis eosam quaeperum et et optatiassi More

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. Links to Manage My Profile > My Profile Information

2. Signs out user and links to FA homepage (not logged in)

3. Links to Shopping Cart and displays the number of items (not total quantity) in the cart. If no items are in the cart, zero (0) is displayed.

4. I Want To menu defaults to open. Click to close menu.

5. Links to Manage My Profile > My Profile Information

6. Links to Manage My Profile > My Sales Team

7. Links to Manage My Profile > My Funds

8. Links to Manage My Profile > My Bookmarks

9. Links to Funds & Performance

10. Links to Forms & Literature

11. Links to Research Insights

12. Links to Practice Matters

13. Links to Retirement Style Matters

14. US Equity Selected under "Explore Our Funds"

Contact Us | Careers

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Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance 1 | Research Insights | Practice Matters | Forms & Literature | Our Firm

Home > Funds & Performance 2

8 Share 9 Print

Funds & Performance A

Quisque odio ante, eleifend sed sollicitudin sit amet, vehicula sit amet velit. Quisque urna mi, pharetra sed semper sed, scelerisque quis neque. Ut sit amet leo. Cras at leo magna.

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

All Shares 3 | Without Sales Load 4 | Without Index 5

Month End 10 | Quarter End 11
As of 10/31/2012

ADD TO MY FUNDS 6 | GET FACT SHEET(S) 7

Export to Excel 12

13

Fund Name	Ticker	Inception Date	YTD as of 11/17/11 (%)	1YR (%)	3YR (%)	5YR (%)	10YR (%)	Since Incep. (%)	Gross/Net Exp. Ratio	Fiscal Year End
Equity - U 14										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Equity: Non-US & Global 15										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name> Saved to My Funds	R>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Fixed Income	16									
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Alternatives										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy

RSM Marketing

Home | Privacy Policy | Glossary | Careers | Press | Business Continuity

NOTES

1. Navigation is highlighted and inactive on this page

2. Breadcrumb trail provides link to previous pages in hierarchy and inactive text describing current page

3. Dropdown menu lists All Shares and individual classes of shares represented in the table. Default is All Shares.

4.Dropdown menu lists Without Sales Load and With Sales Load. Default is Without Sales Load.

5. Dropdown menu lists Without Index and With Index. Default is Without Index.

6. User selects checkbox of one or more funds in the list and clicks Add To My Funds button. Funds are added to My Funds list and 'saved' icons are added next to each of the saved funds. (See #17).

7. User selects checkbox of one or more funds and clicks Get Fact Sheet(s). Get Fact Sheet window displays with selected funds.

8. Launches user's email program with new email populated with subject line, message text and link to this page

9. Links to display printer-friendly version of this page

10. Fund table data default sort is Month End and inactive in this view

11. Click Quarter end to sort table data by Quarter end.

12. Launches Excel program and populates table data as it is currently displayed

13. Table header features sortable columns. Fund categories remain intact when sorting. Default sort is alphabetical by Fund name. Date sorts by chronological and reverse chronological order. Percentage sorts by lowest and highest.

14. Fund name links to Fund Landing Page > Overview

15. A logged in user may save funds to an online profile. Saved funds show an indicator. On hover over indicator, Saved to My Funds text displays.

16. Ticker links to Fund Landing Page > Overview

A. Growth micro- site content: Mutual fund info can appear on this page

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Financial Advisors

Ticker or Keyword [Search]

Welcome Mary Smith | Sign Out (2)

Home | **Funds & Performance** | **Research Insights** | **Practice Matters** | **Forms & Literature** | **Our Firm**

Home > Funds & Performance

Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Funds & Performance

Quisque odio ante, eleifend sed sollicitudin sit amet, vehicula sit amet velit. Quisque urna mi, pharetra sed semper sed, scelerisque quis neque. Ut sit amet convallis leo. Cras at leo magna.

All Shares | Without Sales Load | Without Index

Month End | Quarter End
As of 10/31/2012

ADD TO MY FUNDS | GET FACT SHEET(S)

Export to Excel

Fund Nam		5YR (%)	10YR (%)	Since Incep. (%)	Gross/Net Exp. Ratio	Fiscal Year End
Equity - US						
<Fund	x%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund N	x%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Equity – N						
<Fund N	%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund N	%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Fixed Inc						
<Fund N	x%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund N	x%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Alternativ						
<Fund	x%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund N	x%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy

Get Fact Sheets

1 ×

Order

2 3

5	<Fund Name>	(PDF, 105k)
5	<Fund Name>	(PDF, 105k)
5	<Fund Name>	(PDF, 105k)
5	<Fund Name>	(PDF, 105k)

4 ADD SELECTED TO CART

View/Print

5 Download selected fact sheets

Share

6 Email
7 Facebook
8 Twitter
9 Google +
10 LinkedIn

NOTES

1.Click 'x' to close window and return to parent page

2. Quantity dropdown menu lists quantities. Default is 5.

3. Fund name links to Fund Landing Page > Overview in new window/tab

4.Click to add all quantities of listed fact sheet(s) above to shopping cart. Number next to shopping cart on parent page updates.

5. Click to initiate download of fact sheet pdfs.

6. Launches user's email program with new email populated with subject line, message text and links to selected fact sheet PDFs.

7. Initiates Facebook login/posting process. Relevant image and separate links to each fact sheet will be posted.

8. Initiates Twitter login/posting process. Relevant image and separate links to each fact sheet will be posted.

9. Initiates Google+ login/posting process. Relevant image and separate links to each fact sheet will be posted.

10. Initiates Linkedin login/posting process. Relevant image and separate links to each fact sheet will be posted.

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Financial Advisors ▼

Ticker or Keyword [Search]

Welcome Mary Smith | Sign Out (2) 19

Home	**Funds & Performance**	Research Insights	Practice Matters	Forms & Literature	Our Firm

Home > Funds & Performance > Global Natural Resources Fund

Share Print

8

NAV $ As of 11.11.2012
RSNRX A Shares Price $X.XX Change +X.XX % Chg +X.XX%

A

Global Natural Resources Fund

1 2 3 4 5 6 7

Overview | Performance | Portfolio Holdings | Distribution | Fees & Expenses | Literature | Investment Team

▼ I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

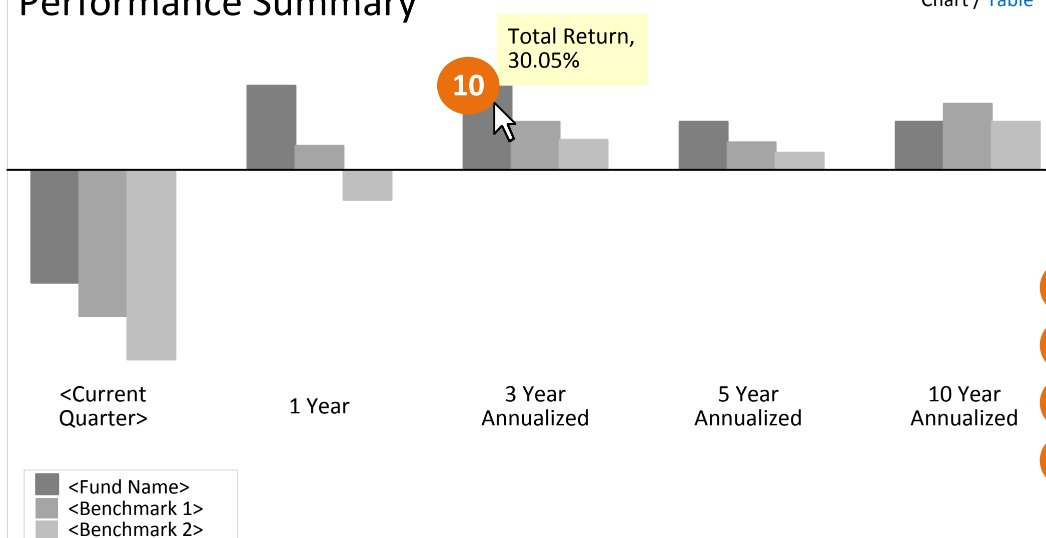
Strategy

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed

9

Performance Summary

Chart / Table



Three Ways to Use This Fund

- Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam
- Consectetur adipiscing elit. ullamcorper, nisl pellentesque tristique ultrices

11

☐ Subscribe to [Fund Name] for important email updates lorem ipsum lorem ipsum

14

Tools [ADD TO MY FUNDS]

Key Documentation

15 16

0 ▾ Fact Sheet
0 ▾ Statistical Summary
0 ▾ Quarterly Commentary
0 ▾ Enhanced Fact Sheet

[ADD TO CART] 17

18 ▶ Morningstar Style Box
19 ▶ Fund Facts
20 ▶ Alerts
21 ▶ Related Content

Performance > 22

NOTES

A. Growth micro- site content: Mutual fund info can appear on this page

12 13

Login or Register to subscribe

▼ Morningstar Style Box 18

	Value	Blend	Growth
Large	☐	☐	☐
Medium	☐	☐	☐
Small	☐	☐	☐

▼ Fund Facts 19

Morningstar Category	<Style Type>
Portfolio Manager	John Smith
Size of Fund (AUM)	$XX.X M
Fund Inception Date	Dd/mm/yyyy
Open to New Investors	<Y/N>
Benchmark Index(s)	<Benchmark Index>
Dividend Frequency	<Frequency>
Total Expense Ratio	<XX.XX%>

▼ Alerts 20

11/15/2012 Lorem ipsum dolor sit amet Read more>

11/10/2012 Donec ullamcorper, nisl pellentesque tristique Read more>

▼ Related Content 21

- Insight/News Article Title
- Insight/News Article Title
- Insight/News Article Title

1. Overview is the default fund view. Link is inactive on this page

2. Links to Performance page for the current fund

3. Links to the Portfolio Holdings page for the current fund

4. Links to the Distribution page for current fund

5. Links to the Fees & Expenses page for current fund

6.Links to the Literature page for current fund

7. Links to Investment Team page for current fund

8. Menu defaults to Class A shares for current fund. Dropdown menu values display other classes.

9. Performance table data can be viewed in chart or table version. Default view is chart. Click table to switch to table view.

10. Hover over chart columns to display ratio details.

11. If a user is logged in and not subscribed to this fund, checkbox will be unchecked. If a user is logged in and subscribed to this fund, checkbox will be checked.

12. If user is not logged in, subscribe call-to-action is replaced by other callout. Login links to Log In page.

13. Register links to Create Online Profile page

14. Click Add to Portfolio to add fund to My Funds

15. Quantity dropdown menu lists quantities. Default is 0.

16. Links display documents in new window

17. Click add to cart to add selected documentation to cart. When documents are added to cart, the numeric value in the shopping cart icon will display.

18. Style box defaults to open and displays Morningstar style box

19. Fund Facts box defaults to open

20. Alerts Box defaults to closed. It displays up to 2 alerts in reverse chronological order with links to press releases or external pages.

21. Related Content defaults to closed. It displays up to three links to documents or PDFs.

22. Link to Fund Performance page for current fund

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Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home	Funds & Performance	Research Insights	Practice Matters	Forms & Literature	Our Firm

Home > Funds & Performance > Global Natural Resources Fund

Share Print

A

Global Natural Resources Fund

NAV $ As of 11.11.2012

RSNRX A Shares	Price	Change	% Chg
	XX.XX	+X.XX	+X.XX%

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Overview | **Performance** | Portfolio Holdings | Distribution | Fees & Expenses | Literature | Investment Team

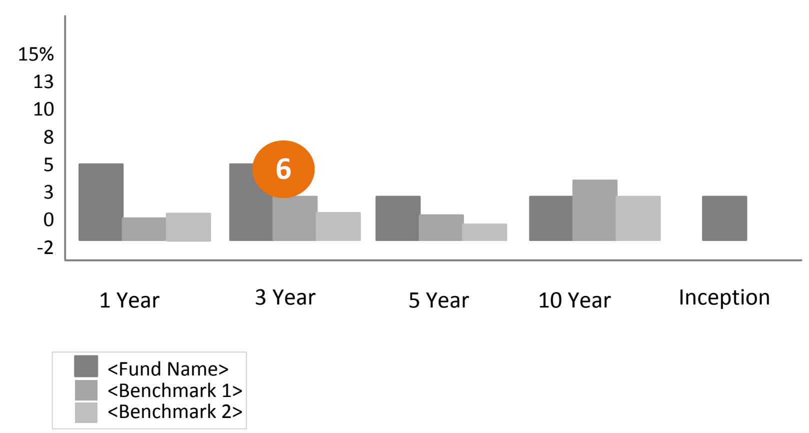
Performance

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed

1 Export to Excel

Average Annual Month-End (%) 2 | Average Annual Qtr-End (%) 3 | Calendar Year (%) 4 | Month End Total Returns (%) 5

RS Partners Fund, Class A	1 Year	3 Year	5 Year	10 Year	Since Inception
RSPFX Without Sales Load	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%
RSPFX With Maximum Sales Load	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%
Russell 2000© Value Index[1]	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%



Price History

12 Month Low-High	$XX.XX - $XX.XX
Monthly Low-High	$XX.XX - $XX.XX
On xx/xx/xxxx date	$XX.XX

Subscribe to [Fund Name] for important email updates lorem ipsum lorem ipsum

Tools ADD TO MY FUNDS

Key Documentation

- 0 Fact Sheet
- 0 Statistical Summary
- 0 Quarterly Commentary
- 0 Enhanced Fact Sheet

ADD TO CART

- Morningstar Style Box
- Fund Facts
- Alerts
- Related Content

RSM Marketing

<continued on next page>

NOTES

1. Click to launch Excel and export table data

2. Default tab displaying table data

3. Click tab to display table data

4. Click tab to display table data

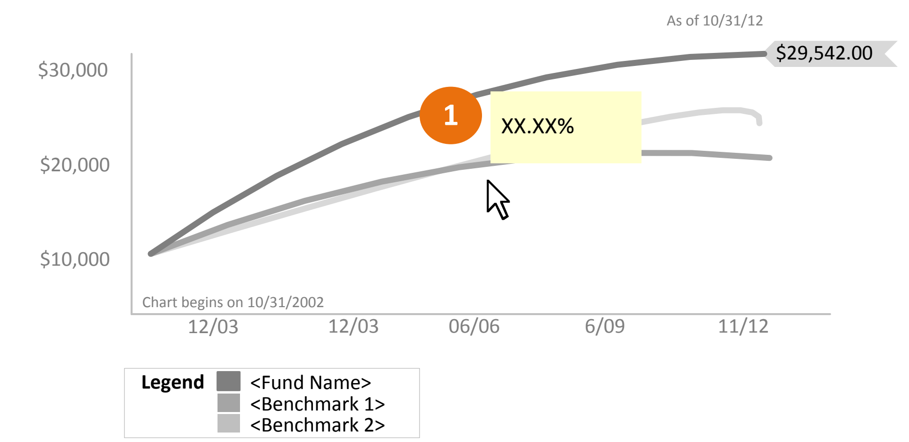
5. Click tab to display table data

6. Hover over chart columns to display ratio details

A. Growth micro- site content: Mutual fund info can appear on this page

<continued from previous page>

Hypothetical $10K Investment



Risk Measures

2 Risk disclosures

	Alpha	Beta	Standard Deviation	Sharpe Ratio	R -Squared	Information Ratio
RSPFX	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%
Benchmark	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%

Morningstar Rating (as of 11/15/2012)

☆☆☆☆☆

Lorem ipsum dolor sit amet, consectetur
Category: <Category Name>

Overall	☆☆☆☆☆
1044 funds in category	
3 Year	☆☆☆☆☆
1044 funds in category	
5 Year	☆☆☆☆☆
1044 funds in category	
10 Year	☆☆☆☆☆
1044 funds in category	

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl

Lipper Ranking (as of 11/15/2012)

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl

1 Year	# out of # <Category name>
5 Year	# out of # <Category name>
10 Year	# out of # <Category name>

Lipper Leaders

5 Consistent Return

5 Total Return

5 Expense

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl

3 < Overview

Portfolio Holdings > 4

NOTES

1. Hover over graph lines to display ratio details

2. Links to Risk disclosure PDF

3. Links to Overview page for current fund

4. Links to Portfolio Holdings page for current fund

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RS | investments   Financial Advisors

Ticker or Keyword [Search]

Welcome Mary Smith | Sign Out (2)

Home	Funds & Performance	Research Insights	Practice Matters	Forms & Literature	Our Firm

Home > Funds & Performance > Global Natural Resources Fund   Share   Print

A

Global Natural Resources Fund

NAV $ As of 11.11.2012

RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

Overview | Performance | **Portfolio Holdings** | Distribution | Fees & Expenses | Literature | Investment Team

Portfolio Holdings As of <dd/mm/yyyy>

▼ I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Top Ten Holdings

1 Chart / Table

Company 1	XX.XX%
Company 2	XX.XX%
Company 3	XX.XX%
Company 4	XX.XX%
Company 5	XX.XX%
Company 6	XX.XX%
Company 7	XX.XX%
Company 8	XX.XX%
Company 9	XX.XX%
Company 10	XX.XX%
Total	**XX.XX%**

Characteristics

Number of Holdings	XX
Weighted Average Market Cap	$X.X Billion
Weighted Median Market Cap	$X.X Billion
P/E Ratio (12 Month Trailing)	XX.XX%
P/B Ratio	XX.XX%
Current Dividend Yield*	X.X
Turnover Ratio (12 Month Trailing)	XX.XX%

Subscribe to [Fund Name] for important email updates lorem ipsum lorem ipsum

Tools [ADD TO MY FUNDS]

Key Documentation

- 0 ▾ Fact Sheet
- 0 ▾ Statistical Summary
- 0 ▾ Quarterly Commentary
- 0 ▾ Enhanced Fact Sheet

[ADD TO CART]

▸ Morningstar Style Box

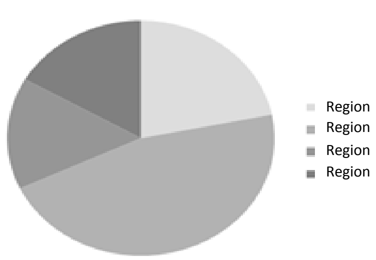
▸ Fund Facts

▸ Alerts

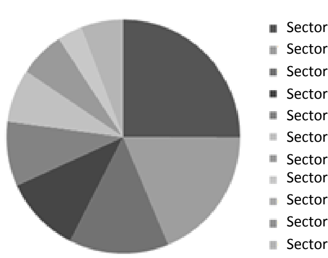
▸ Related Content

2 Download the Full Quarterly Holdings

Distribution by Market Capitalization 3 Chart / Table



Distribution by Sector Chart / Table 4



<continued on next page>

NOTES

1. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

2. Links to PDF.

3. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

4. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

A. Growth micro- site content: Mutual fund info can appear on this page

<continued from previous page>

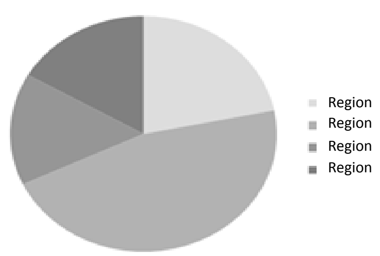
Top 5 Quarterly Realized Contribu 1 Chart / Table

1. Company 1	X.XX%
2. Company 2	X.XX%
3. Company 3	X.XX%
4. Company 4	X.XX%
5. Company 5	X.XX%

Top 5 Quarterly Realized Detract 2 Chart / Table

1. Company 1	-X.XX%
2. Company 2	-X.XX%
3. Company 3	-X.XX%
4. Company 4	-X.XX%
5. Company 5	-X.XX%

Distribution by Region 3 Chart / Table



Top 5 Countries 4 Chart / Table

Country	X.XX%
Country	X.XX%
Country	X.XX%
Country	X.XX%
Country	X.XX%
Total	**X.XX%**

Top 5 Currencies 5 Chart / Table

Currency	X.XX%
Currency	X.XX%
Currency	X.XX%
Currency	X.XX%
Currency	X.XX%
Total	**X.XX%**

6 < Performance

Distribution > 7

NOTES

1. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

2. Data can be viewed in chart or table version. Default view is chart. Click table to switch to table view.

3. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

4. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

5. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

6. Links to Performance page for current fund

7. Links to Distribution page for current fund

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A

Global Natural Resources Fund

NAV $ As of 11.11.2012			
RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Overview | Performance | Portfolio Holdings | **Distribution** | Fees & Expenses | Literature | Investment Team

Distribution

Distribution History

Short-term Cap Gains/Loss	Long-term Cap Gains/Loss	Total (Divs + Cap Gains/Loss)	Record Date	Ex-Div Date	Pay Date
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy

Distribution Schedule

Dividends	Month 1, Month 2
Capital Gains	Yearly or Monthly

1

Download Related Document

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Key Documentation

- 0 Fact Sheet
- 0 Statistical Summary
- 0 Quarterly Commentary
- 0 Enhanced Fact Sheet

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- Fund Facts
- Alerts
- Related Content

2 < Portfolio Holdings

Fees & Expenses > 3

NOTES

1. Links to PDF
2. Links to Portfolio Holdings for current fund
3. Links to Fees & Expenses for current fund

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Global Natural Resources Fund

NAV $ As of 11.11.2012

RSNRX A Shares	Price	Change	% Chg
	XX.XX	+X.XX	+X.XX%

Overview | Performance | Portfolio Holdings | Distribution | **Fees & Expenses** | Literature | Investment Team

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Fees & Expenses

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, feugiat tortor.

Average Annual Fund Operating Expenses

Maximum Expense	X.XX%
Average Net Expenses	X.XX%
Average <Benchmark> Fee	X.XX%

Fund Operating Expenses 1

Minimum Investment

Minimum Investment	$XX,XXX
Subsequent Min. Investment	$XX,XXX

Calculate Expenses

Amount Invested ($) 2

Time Invested 1 year 3

Calculate 4

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0 Quarterly Commentary
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- Fund Facts
- Alerts
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6 < Distribution

Literature > 7

NOTES

1. Links to PDF
2. Enter numeric values
3. Menu dropdown values include 1 year, 3 years, 5 years, 10 years. Default value is 1 year.
4. Submits expense calculation and displays results
5. Expenses for selected time frame and total expenses display
6. Links to Distribution for current fund
7. Links to Literature for current fund

A. Growth micro- site content: Mutual fund info can appear on this page

Results table displays below Expense Calculator once user enters information and clicks 'Calculate.'

5

Expenses for one year	$XXXX
Total expenses	$XXXX

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Global Natural Resources Fund

NAV $ As of 11.11.2012

RSNRX A Shares	Price	Change	% Chg
	XX.XX	+X.XX	+X.XX%

Overview | Performance | Portfolio Holdings | Distribution | Fees & Expenses | **Literature** | Investment Team

▼ I want to….

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- View My Funds
- View My Bookmarks
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- Order Literature
- Get Sales Ideas to share with my Clients
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Literature

[EMAIL TO A CLIENT] 1

Most Recent | Most Popular 2

3 4 5 6 7

Title (PDF 200K) 0 ▾ [ADD TO CART]

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam et porta . More info>

Title (PDF 200K) 0 ▾ [ADD TO CART]

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam et porta . More info>

Title (PDF 200K) 0 ▾ [ADD TO CART]

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Key Documentation

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- 0 ▾ Statistical Summary
- 0 ▾ Quarterly Commentary
- 0 ▾ Enhanced Fact Sheet

[ADD TO CART]

▸ Morningstar Style Box

▸ Fund Facts

▸ Alerts

▸ Related Content

8 < Fees & Expenses

Investment Team > 9

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. User selects checkbox of one or more documents in the list and clicks Email to a Client button. User's email program launches with new email populated with subject line, message text and link(s) to selected documents.

2. Documents display sorted by Most Recent by default. Click Most Popular to re-sort list.

3. Select checkbox for document(s) to email to a client

4. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

5. Title link displays document PDF in new window/tab

6. Quantity dropdown menu lists quantities. Default is 0.

7. Click to add selected quantity of document to shopping cart.

8. Links to Fees & Expenses for current fund

9. Links to Investment Team for current fund

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Global Natural Resources Fund

NAV $ As of 11.11.2012

RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

Overview | Performance | Portfolio Holdings | Distribution | Fees & Expenses | Literature | **Investment Team**

I want to....

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- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

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Investment Team A

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed feugiat tortor dolor.

Firstname, Lastname
Portfolio Manager
XX Years With RS Investments

Biography

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula vehicula. Vestibulum sit amet arcu vitae lectus ultrices varius nec quis tellus. Aliquam erat volutpat.

1 Read documents by this manager

2 Subscribe to [Portfolio Manager]

Firstname, Lastname
Director
XX Years With RS Investments

Biography

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3 < Literature

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Key Documentation

- 0 Fact Sheet
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- 0 Quarterly Commentary
- 0 Enhanced Fact Sheet

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- Alerts
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NOTES

1. Links to filtered view of the Forms & Literature page

2. If a user is logged in and not subscribed to this portfolio manager, checkbox will be unchecked. If a user is logged in and subscribed to this portfolio manager, checkbox will be checked.

3. Links to Literature for current fund

4. Displays in place of 'Subscribe to Portfolio Manager' if user is not logged in

A. Growth micro- site content: Profile Managers & Heads of Research for respective funds

Login or Register to subscribe 4

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Share Print 8

NAV $ As of 11.11.2012
RSNRX A Shares | Price XX.XX | Change +X.XX | % Chg +X.XX%

Global Natural Resources Fund

Overview 1 | Performance 2 | Portfolio Holdings 3 | Distribution 4 | Fees & Expenses 5 | Literature 6 | Investment Team 7

I want to....

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- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
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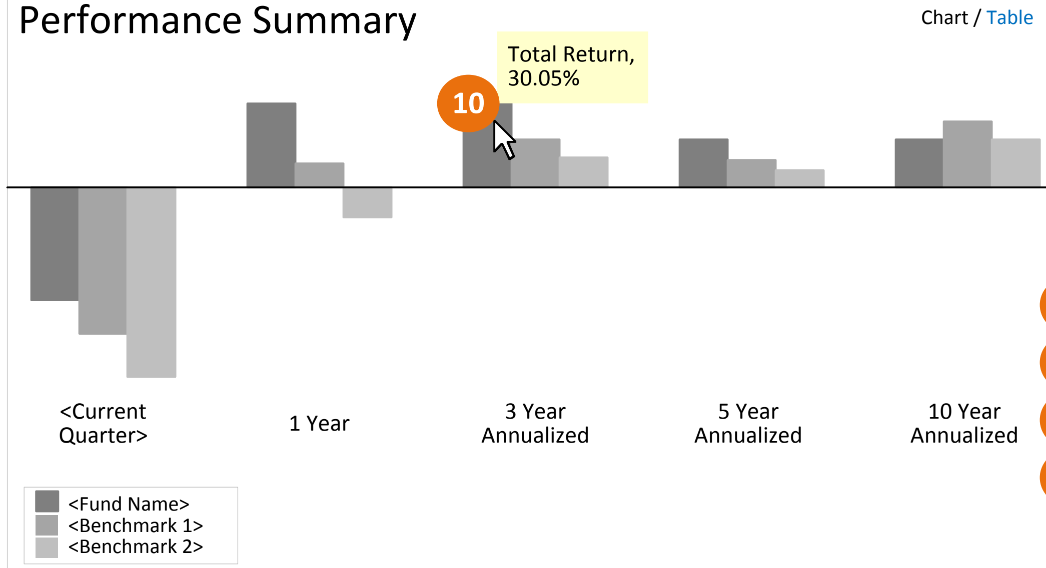
Strategy

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed

9

Performance Summary

Chart / Table



Three Ways to Use This Fund

- Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam
- Consectetur adipiscing elit. ullamcorper, nisl pellentesque tristique ultrices

Performance > 22

11 Subscribe to [Fund Name] for important email updates lorem ipsum lorem ipsum

Tools 14 ADD TO MY FUNDS

Key Documentation

15 16
0 Fact Sheet
0 Statistical Summary
0 Quarterly Commentary
0 Enhanced Fact Sheet

ADD TO CART 17

18 Morningstar Style Box
19 Fund Facts
20 Alerts
21 Related Content

NOTES

12 13
Login or Register to subscribe

Morningstar Style Box 18

	Value	Blend	Growth
Large			
Medium			
Small			

Fund Facts 19

Morningstar Category	<Style Type>
Portfolio Manager	John Smith
Size of Fund (AUM)	$XX.X M
Fund Inception Date	Dd/mm/yyyy
Open to New Investors	<Y/N>
Benchmark Index(s)	<Benchmark Index>
Dividend Frequency	<Frequency>
Total Expense Ratio	<XX.XX%>

Alerts 20

11/15/2012 Lorem ipsum dolor sit amet Read more>

11/10/2012 Donec ullamcorper, nisl pellentesque tristique Read more>

Related Content 21

- Insight/News Article Title
- Insight/News Article Title
- Insight/News Article Title

1. Overview is the default fund view. Link is inactive on this page

2. Links to Performance page for the current fund

3. Links to the Portfolio Holdings page for the current fund

4. Links to the Distribution page for current fund

5. Links to the Fees & Expenses page for current fund

6.Links to the Literature page for current fund

7. Links to Investment Team page for current fund

8. Menu defaults to Class A shares for current fund. Dropdown menu values display other classes.

9. Performance table data can be viewed in chart or table version. Default view is chart. Click table to switch to table view.

10. Hover over chart columns to display ratio details.

11. If a user is logged in and not subscribed to this fund, checkbox will be unchecked. If a user is logged in and subscribed to this fund, checkbox will be checked.

12. If user is not logged in, subscribe call-to-action is replaced by other callout. Login links to Log In page.

13. Register links to Create Online Profile page

14. Click Add to Portfolio to add fund to My Funds

15. Quantity dropdown menu lists quantities. Default is 0.

16. Links display documents in new window

17. Click add to cart to add selected documentation to cart. When documents are added to cart, the numeric value in the shopping cart icon will display.

18. Style box defaults to open and displays Morningstar style box

19. Fund Facts box defaults to open

20. Alerts Box defaults to closed. It displays up to 2 alerts in reverse chronological order with links to press releases or external pages.

21. Related Content defaults to closed. It displays up to three links to documents or PDFs.

22. Link to Fund Performance page for current fund

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Fixed Income Fund (Money Market)

NAV $ As of 11.11.2012			
RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

I want to....

- Manage My Online Profile & Subscriptions
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- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Overview | **Performance** | Portfolio Holdings | Distribution | Fees & Expenses | Literature | Investment Team

Performance

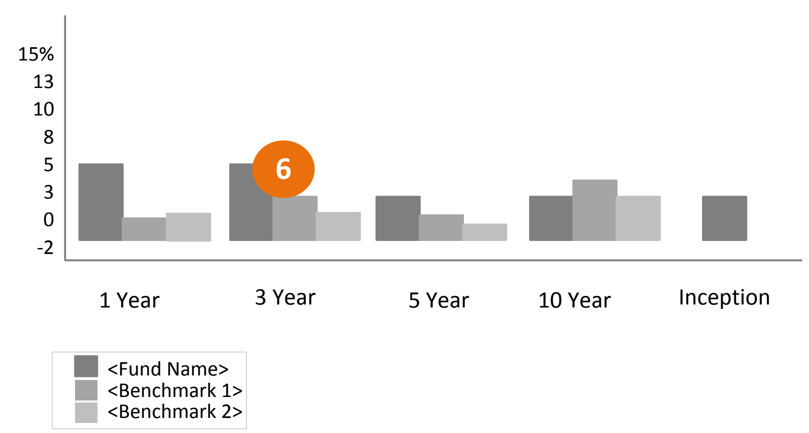
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed

1

Export to Excel

Average Annual Month-End (%) 2 | Average Annual Qtr-End (%) 3 | Calendar Year (%) 4 | Month End Total Returns (%) 5

RS Partners Fund, Class A	1 Year	3 Year	5 Year	10 Year	Since Inception
RSPFX Without Sales Load	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%
RSPFX With Maximum Sales Load	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%
Russell 2000© Value Index[1]	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%



Price History

12 Month Low-High	$XX.XX - $XX.XX
Monthly Low-High	$XX.XX - $XX.XX
On xx/xx/xxxx date	$XX.XX

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Key Documentation

- 0 Fact Sheet
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ADD TO CART

- Morningstar Style Box
- Fund Facts
- Alerts
- Related Content

RSM Marketing

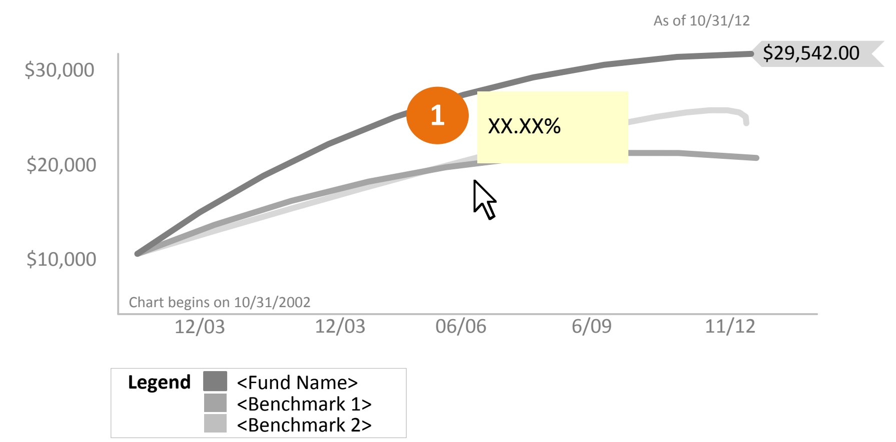
<continued on next page>

NOTES

1. Click to launch Excel and export table data
2. Default tab displaying table data
3. Click tab to display table data
4. Click tab to display table data
5. Click tab to display table data
6. Hover over chart columns to display ratio details

<continued from previous page>

Hypothetical $10K Investment



Risk Measures

2 Risk disclosures

	Alpha	Beta	Standard Deviation	Sharpe Ratio	R -Squared	Information Ratio
RSPFX	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%
Benchmark	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%	X.XX%

Yield Information (Fixed Income only)

	SEC 30-Day Yield with subsidy	SEC 30-Day Yield without subsidy	Monthly Distribution Yield with subsidy	Monthly Distribution Yield without subsidy
RSPFX	X.XX%	X.XX%	X.XX%	X.XX%
Benchmark	X.XX%	X.XX%	X.XX%	X.XX%

Yield Information (Money Market only)

	Current Yield with subsidy	Current Yield without subsidy	Effective Yield with subsidy	Effective Yield without subsidy
RSPFX	X.XX%	X.XX%	X.XX%	X.XX%
Benchmark	X.XX%	X.XX%	X.XX%	X.XX%

Morningstar Rating (as of 11/15/2012)

Lorem ipsum dolor sit amet, consectetur
Category: <Category Name>

Overall
1044 funds in category
3 Year
1044 funds in category
5 Year
1044 funds in category
10 Year
1044 funds in category

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl

Lipper Ranking (as of 11/15/2012)

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl

1 Year	# out of # <Category name>
5 Year	# out of # <Category name>
10 Year	# out of # <Category name>

Lipper Leaders

5 Consistent Return
5 Total Return
5 Expense

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl

3 < Overview

4 Portfolio Holdings >

NOTES

1. Hover over graph lines to display ratio details
2. Links to Risk disclosure PDF
3. Links to Overview page for current fund
4. Links to Portfolio Holdings page for current fund

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Fixed Income Fund (Money Market)

NAV $ As of 11.11.2012

RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

Overview | Performance | **Portfolio Holdings** | Distribution | Fees & Expenses | Literature | Investment Team

Portfolio Holdings As of <dd/mm/yyyy>

Top Ten Holdings

1 Chart / Table

Holding	Coupon Rate	Maturity	
Issuer 1	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 2	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 3	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 4	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 5	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 6	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 7	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 8	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 9	XX.XX%	dd/mm/yyyy	XX.XX%
Issuer 10	XX.XX%	dd/mm/yyyy	XX.XX%
Total			**XX.XX%**

2 Download the Full Quarterly Holdings

Characteristics

Number of Holdings	XX
Average Coupon	XX
Average Yield to Maturity* FI Years; MM Days	XX
Average Duration* (years) FI Years; MM Days	XX
Average Maturity* (years) FI Years; MM Days	XX
Average Life* (years) FI Years; MM Days	

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- Alerts
- Related Content

By Sector

3 Chart / Table

Credit Quality Distribution

4 Chart / Table

	Credit Rating	Percentage
Lorem Ipsum	999	X.XX%
Dvort Karem	999	X.XX%
Lorem Ipsum	999	X.XX%
Dvort Karem	999	X.XX%
Lorem Ipsum	999	X.XX%
Dvort Karem	999	X.XX%
Total		**X.XX%**

<continued on next page>

NOTES

1. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

2. Links to PDF.

3. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

4. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

<continued from previous page>

Top 5 Quarterly Realized Contribu 1 Chart / Table

1. Company 1	X.XX%
2. Company 2	X.XX%
3. Company 3	X.XX%
4. Company 4	X.XX%
5. Company 5	X.XX%

Top 5 Quarterly Realized Detract 2 Chart / Table

1. Company 1	-X.XX%
2. Company 2	-X.XX%
3. Company 3	-X.XX%
4. Company 4	-X.XX%
5. Company 5	-X.XX%

Bond Maturity Range 3 hart / Table

	Years/(mm)days	Percentage
Lorem Ipsum	11	X.XX%
Dvort Karem	11	X.XX%
Lorem Ipsum	11	X.XX%
Dvort Karem	11	X.XX%
Lorem Ipsum	11	X.XX%
Dvort Karem	11	X.XX%
Total		**X.XX%**

4 < Performance

Distribution > 5

NOTES

1. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

2. Data can be viewed in chart or table version. Default view is chart. Click table to switch to table view.

3. Data can be viewed in chart or table version. Default view is table. Click chart to switch to chart view.

4. Links to Performance page for current fund

5. Links to Distribution page for current fund

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NAV $ As of 11.11.2012			
RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

Overview | Performance | Portfolio Holdings | **Distribution** | Fees & Expenses | Literature | Investment Team

Distribution

Distribution History

Short-term Cap Gains/Loss	Long-term Cap Gains/Loss	Total (Divs + Cap Gains/Loss)	Record Date	Ex-Div Date	Pay Date
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy
$XX.XX	$XX.XX	$XX.XX	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy

Distribution Schedule

Dividends	Month 1, Month 2
Capital Gains	Yearly or Monthly

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- 0 Quarterly Commentary
- 0 Enhanced Fact Sheet

ADD TO CART

- Morningstar Style Box
- Fund Facts
- Alerts
- Related Content

2 < Portfolio Holdings

Fees & Expenses > 3

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NOTES

1. Links to PDF
2. Links to Portfolio Holdings for current fund
3. Links to Fees & Expenses for current fund

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Fixed Income Fund (Money Market)

NAV $ As of 11.11.2012

RSNRX	Price	Change	% Chg
A Shares	XX.XX	+X.XX	+X.XX%

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Overview | Performance | Portfolio Holdings | Distribution | **Fees & Expenses** | Literature | Investment Team

Fees & Expenses

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, feugiat tortor.

Average Annual Fund Operating Expenses

Maximum Expense	X.XX%
Average Net Expenses	X.XX%
Average <Benchmark> Fee	X.XX%

Fund Operating Expenses 1

Minimum Investment

Minimum Investment	$XX,XXX
Subsequent Min. Investment	$XX,XXX

Calculate Expenses

Amount Invested ($) 2

Time Invested 1 year 3

Calculate 4

Subscribe to [Fund Name] for important email updates lorem ipsum lorem ipsum

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Key Documentation

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6 < Distribution

Literature > 7

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NOTES

1. Links to PDF
2. Enter numeric values
3. Menu dropdown values include 1 year, 3 years, 5 years, 10 years. Default value is 1 year.
4. Submits expense calculation and displays results
5. Expenses for selected time frame and total expenses display
6. Links to Distribution for current fund
7. Links to Literature for current fund

Results table displays below Expense Calculator once user enters information and clicks 'Calculate.'

Expenses for one year	$XXXX
Total expenses	$XXXX

5

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RSNRX A Shares	Price	Change	% Chg
	XX.XX	+X.XX	+X.XX%

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RSM Marketing

Overview | Performance | Portfolio Holdings | Distribution | Fees & Expenses | **Literature** | Investment Team

Literature

EMAIL TO A CLIENT 1

Most Recent | Most Popular 2

3 4 5 **Title** (PDF 200K) 6 0 ADD TO CART 7

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Title (PDF 200K) 0 ADD TO CART

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- 0 Statistical Summary
- 0 Quarterly Commentary
- 0 Enhanced Fact Sheet

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- Morningstar Style Box
- Fund Facts
- Alerts
- Related Content

8 < Fees & Expenses

Investment Team > 9

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NOTES

1. User selects checkbox of one or more documents in the list and clicks Email to a Client button. User's email program launches with new email populated with subject line, message text and link(s) to selected documents.

2. Documents display sorted by Most Recent by default. Click Most Popular to re-sort list.

3. Select checkbox for document(s) to email to a client

4. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

5. Title link displays document PDF in new window/tab

6. Quantity dropdown menu lists quantities. Default is 0.

7. Click to add selected quantity of document to shopping cart.

8. Links to Fees & Expenses for current fund

9. Links to Investment Team for current fund

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Overview | Performance | Portfolio Holdings | Distribution | Fees & Expenses | Literature | **Investment Team**

Investment Team

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Firstname, Lastname
Portfolio Manager
XX Years With RS Investments

Biography

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1 Read documents by this manager

2 Subscribe to [Portfolio Manager]

Firstname, Lastname
Director
XX Years With RS Investments

Biography

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NOTES

1. Links to filtered view of the Forms & Literature page

2. If a user is logged in and not subscribed to this portfolio manager, checkbox will be unchecked. If a user is logged in and subscribed to this portfolio manager, checkbox will be checked.

3. Links to Literature for current fund

4. Displays in place of 'Subscribe to Portfolio Manager' if user is not logged in

Login or Register to subscribe 4

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Refine Results

Client approved 11
Yes (64)
No (32)

Format 12
Commentary (38)
Interest Magazine (45)
Whitepaper (18)
Video (12)

Asset Class 13
Equity - US (26)
Equity – Non-US & Global (43)
Fixed Income (12)
Alternatives (15)

Fund 14
Fund Name (3)
Fund Name (19)
Fund Name (12)
Fund Name (8)
Fund Name (6)
Fund Name (22)
Fund Name (1)
Fund Name (4)
Fund Name (17)
Fund Name(5)
Fund Name (12)
Fund Name (9)
Fund Name (4)
Fund Name (10)
Fund Name(3)
Fund Name (0)

Portfolio Manage 15
Portfolio Mgr Name (3)
Portfolio Mgr Name (19)
Portfolio Mgr Name (12)
Portfolio Mgr Name (8)
Portfolio Mgr Name (6)
Portfolio Mgr Name (22)
Portfolio Mgr Name (1)
Portfolio Mgr Name (4)
Portfolio Mgr Name (17)
Portfolio Mgr Name (5)
Portfolio Mgr Name (12)
Portfolio Mgr Name (9)
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Portfolio Mgr Name (10)

Research Insights

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1-20 of 96 results 1 Show 20 Results per page 2 Previous 1 2 3 4 5 Next 3

4 5 6 Title

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Title

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Title

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Most Recent / Most Popular 7

8 9 10 Title

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Title

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NOTES

1. Segment (e.g 1-20) of results, along with the total number of results display.

2. Dropdown menu defaults to 20 results per page. Menu options are 20, 50, 100, All.

3. Pagination displays defaulting to page 1 with previous link disabled. User can navigate to the next page by clicking either the page number or the 'Next' link.

4. Representative image of document displays.

5. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

6. Title link displays document PDF in new window/tab

7. Documents display sorted by Most Recent by default. Click Most Popular to re-sort list.

8. Representative image of document displays.

9. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

10. Title link displays document PDF in new window/tab

11. Select 'Yes' or 'No' to filter results. # of results with that criteria displays in parentheses after all refinement criteria.

12. Select a Format to filter results

13. Select a Family to filter results

14. Select a Fund to filter results

15. Select a Portfolio Manager to filter results

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Client approved
Yes (14) 1

Format
Magazine (14)

Asset Class
Equity-US (3)
Equity-Non-US & Global (3)
Fixed Income (7)
Alternatives (1)

Fund
Fund Name (3)
Fund Name (1)
Fund Name (1)
Fund Name (2)
Fund Name (2)
Fund Name (3)
Fund Name (1)

Portfolio Manager
Portfolio Mgr Name (2)
Portfolio Mgr Name (2)
Portfolio Mgr Name (3)
Portfolio Mgr Name (2)
Portfolio Mgr Name (3)
Portfolio Mgr Name (2)

Research Insights

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☑ Interest Magazine
(Uncheck to see more results)

1-14 of 14 results Previous **1** Next

Title

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Title

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Title

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Most Recent / Most Popular

Title

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Title

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Title

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NOTES

1. In this filtered view of Research Insights, the user has selected two filters – "Yes" and "Magazine," reducing the number of displayed results. The selected items are highlighted in the left column and the remaining items from each its categories are eliminated.

2. The chosen filters display at the top of the results with selected checkboxes. Unchecking the checkboxes will restore all filtering criteria to its category in the left column and restore items from that category to the displayed results.

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Interest Magazine

Lorem Ipsum

Va tu Karem tu Eto

Karem Vos Danu Tobid

Lorem Karem

Vivamus sit Amet Lacus

Interest Magazine

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more >>>

June Isue	May Issue	April Issue
Resource Title Introductory statement volupta simagni musaniet dis eosam more >>	**Resource Title** Introductory statement volupta simagni musaniet dis eosam more >>	**Resource Title** Introductory statement volupta simagni musaniet dis eosam more >>
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Home > Research Insights > Q & A with Growth Team Technology Analyst...

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1 **Q&A with Growth Team Technology Analyst, Paul Leung, CFA**

RS Investments welcomed Paul Leung, CFA to the Growth team in March. He will cover software, internet, and technology services in conjunction with Portfolio Manager and technology analyst Steve Bishop.

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Q **Paul, RS is pleased to welcome you to the firm. What appealed to you about the analyst role with the RS Growth Team?**

A The RS platform, with its history of growth investing and dedication to fundamental research, gives me the ability to capitalize and leverage knowledge that I have developed over the past nine years as a buyside technology analyst. My software and internet services experience is complementary to [co-Portfolio Manager] Steve Bishop's hardware expertise, and I believe in the long-term investment philosophy of the team. The flat structure in the group also ensures that the investment decisions are in the hands of those with the most knowledge. I also did a lot of due diligence on the team, the platform, and the process and came away with very positive impressions.

Q **2012 has been a strong year for technology stocks, driven by powerful themes such as mobile technology and cloud computing. What types of companies do you look for in these emerging industries?**

A We are investing in the midst of powerful secular trends in technology related to modernization, the need for productivity increases, and the shift away from manual processes. One example is the interaction between smartphones, tablets and applications. Mobile devices are powerful because they combine location-based information with ease of use and are immediately accessible to users. There is a huge opportunity for companies to monetize this information through advertising and analytics. However, the explosion of data can do more harm than good if companies do not have the infrastructure and analytical tools to address the pain points. Cloud computing companies, and specifically Software as a Service (SaaS) companies, are racing to capitalize. These technologies were a curiosity five years ago, but as larger companies are becoming comfortable with it in terms of security and cost and maintenance, enterprise adoption has rapidly increased. We are looking for companies whose innovations have the ability to disrupt legacy business models, as well as companies that solve the pain points that are developing as these technologies continue to evolve.

Related

5 6 7 **Title**

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2. Links to results page of Research Insights

3. If a user is logged in and not subscribed to this whitepaper, checkbox will be unchecked. If a user is logged in and subscribed to this whitepaper, checkbox will be checked. If a user is not logged in, the Login or Register to subscribe module replaces #3 and #4 (both Subscribe to boxes). (Only one Login or Register to subscribe box will displays0. Subscribe to boxes display based on the type of article.

4. If a user is logged in and not subscribed to this Portfolio Manager, checkbox will be unchecked. If a user is logged in and subscribed to this Portfolio Manager, checkbox will be checked.

5. Representative image of document displays.

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Q&A with Growth Team Technology Analyst, Paul Leung, CFA

RS Investments welcomed Paul Leung, CFA to the Growth team in March. He will cover software, internet, and technology services in conjunction with Portfolio Manager and technology analyst Steve Bishop.

1

Q Paul, RS is pleased to welcome you to the firm. What appealed to you about the analyst role with the RS Growth Team?

Q 2012 has been a strong year for technology stocks, driven by powerful themes such as mobile technology and cloud computing. What types of companies do you look for in these emerging industries?

Q Quantifying the benefits of social media can be a challenge for businesses. Two newer buzzwords in the industry are 'social graph' and 'ecosystem'. What do these terms mean and how are social themes changing the technology landscape?

Q In the past decade, technology companies have endured famous boom and bust cycles. How do you stay disciplined about investing in companies with strong long-term prospects?

Q **Paul, RS is pleased to welcome you to the firm. What appealed to you about the analyst role with the RS Growth Team?**

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1. Click links to anchor to the specific question and answer within the body of the article.

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Managing Your Time 3

Building Your Brand 4

Retirement Style Matters 5

The Great Differentiator

Providing outstanding client service, which embraces effective and efficient communication, can separate you from the pack.

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Resources For Your Practice 7 8

6 **Resource Title**

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More 9

Resource Title

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More

Resources For Your Clients 11 12

10 **Resource Title**

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Introductory statement volupta simagni musaniet dis eosam 15

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NOTES

1. Defining Your Practice content shows by default. Click Read More to view the related article.

2. Click Servicing Your Clients to display detailed content to the right. A "Read More" link provides access to the related article.

3. Click Managing Your Time to display detailed content to the right. A "Read More" link provides access to the related article.

4. Click Building Your Brand to display detailed content to the right. A "Read More" link provides access to the related article.

5. Click Retirement Style Matters to display detailed content to the right. A "Read More" link provides access to the Retirement Style Matters landing page.

6. Representative image of document displays.

7. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

8. Click link to display document/article

9. Click link to display document/article

10. Representative image of document displays.

11. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

12. Click link to display document/ article

13. Click link to display document/ article

14. Link to view RSM page in Individual Investor website

15. Launches RSM test in modal overlay

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2

< Back to Practice Matters

Practice Matters

1

Servicing Your Clients: The Great Differentiator

Like any small business owner, you likely recognize that providing outstanding client service is crucial. To stand apart from the pack, build a client service model that embraces effective – and efficient – communication.

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In this example, the advisor has segmented his or her client base. We know that, generally, 80% of your business will come from your top 20% of clients. It makes sense that you provide an elevated level of services to the top tier of clients.

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Delivering Constructive Client Reviews

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NOTES

1. Select star to add a page to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

2. Links to Practice Matters

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2 3 4

Who You Are Matters | **What Resources Are Available** | **How To Move Forward**

5

Saving for retirement matters. A lot. But you cannot meaningfully plan for it until you have a clear understanding of who you are. What makes you happy? What motivates you? Who is most important to you?

If you haven't considered these questions as part of your planning process, it's a worthwhile exercise. After all, financial goals are a consequence of personal goals.

Learn about the four personality styles

Retirement Style Matters is designed to bring clarity and focus to the planning process. The goal is to approach it from a different angle: Personality. Because emotions and behaviors largely impact your financial mindset and habits.

We've identified four different retirement styles, or personalities, that can give you insight into who you are. Armed with this knowledge, you can work with your financial professional to develop a holistic retirement plan. And then you can focus on what matters most: Doing something you love, with people you love, every day of your life.

Related

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NOTES

1. Launches test in modal overlay

2. Section is highlighted and inactive, displays by default on page load.

3. Click to display What Resources content below. Only bottom section refreshes.

4. Click to display How To content below. Only bottom section refreshes.

5. Launches graphic in modal overlay

6. Representative image of document displays.

7. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

8. Click link to display document/article in new window/tab

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Retirment Style Matters

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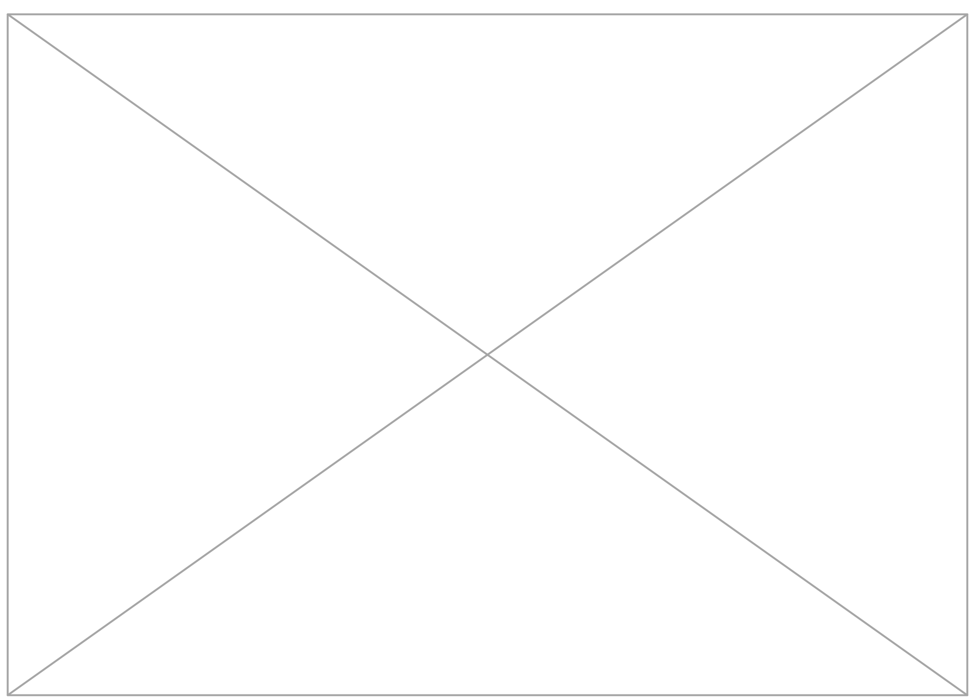
What's your retirement style? Take the test

1

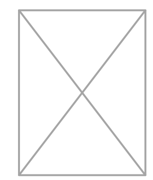
Who You Are Matters | **What Resources Are Available** | **How To Move Forward**

To support your retirement planning, we have a number of resources that you can leverage. Our tools cover a wide spectrum of topics, whether you're looking for help focusing on the big picture or looking for solutions to a specific need. There is a wise Chinese proverb that reads: "The best time to plant a tree is 20 years ago. The second best time is now." Indeed, the most important thing to do is step forward.



Today many people rely on pensions and social security to help fund their retirement.

Related



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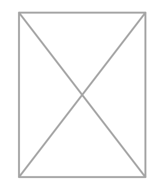

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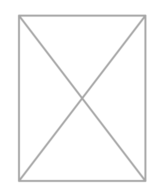

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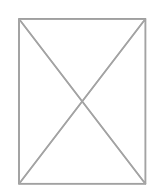

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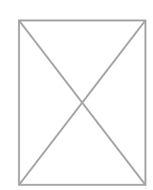

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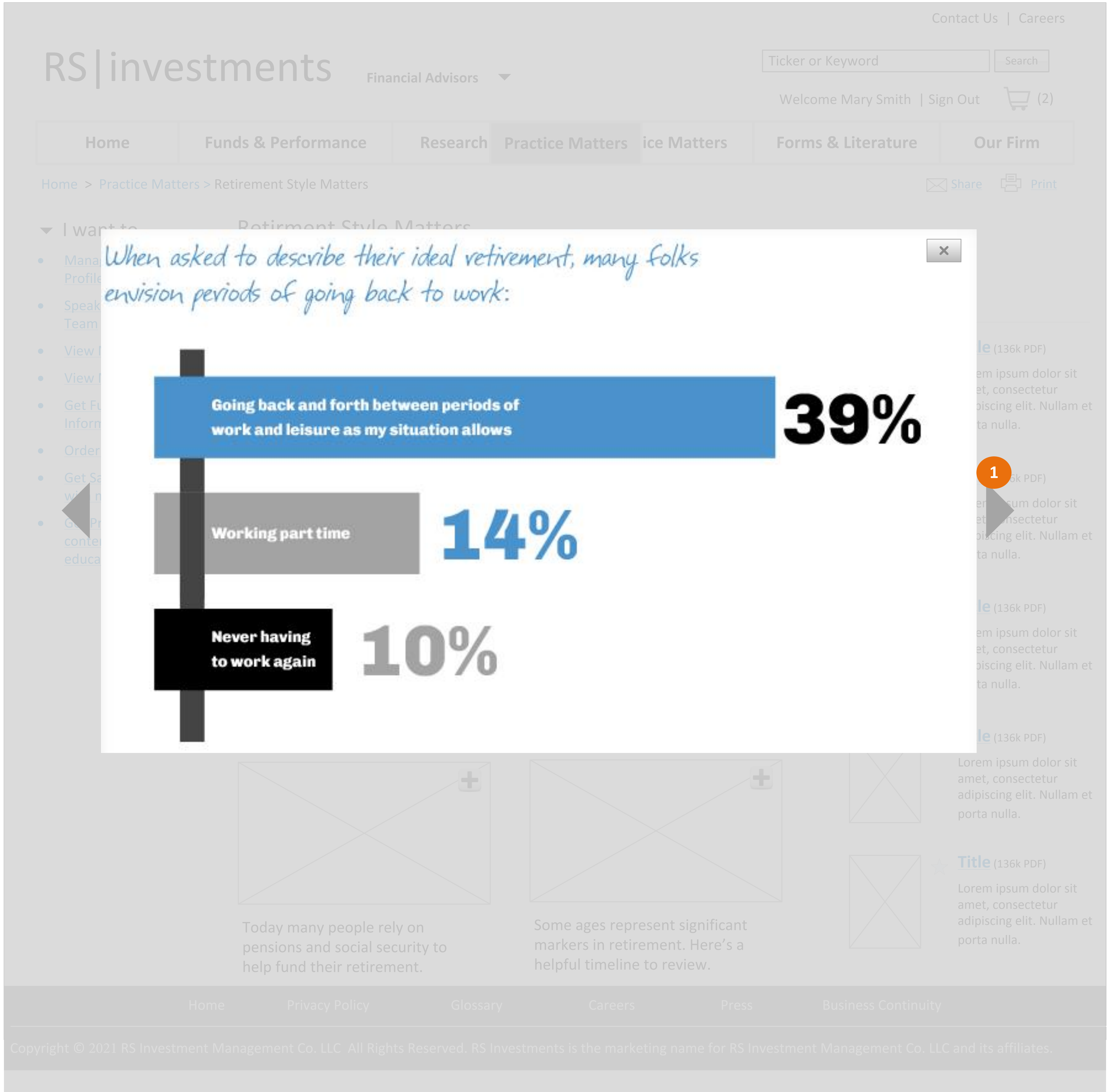
NOTES

1. Link is selected and inactive in this view



NOTES

1. Selecting a graphic on the parent page displays modal overlay. If there are multiple graphics, arrow navigation will display to link to previous and next graphics.

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Home > Practice Matters > Retirement Style Matters

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Retirment Style Matters

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1

×

Planning for retirement is a serious process, but it isn't only about numbers and calculators.

Personality matters too.

Indeed, your emotions and behaviors impact the way you plan for retirement. We've identified four distinct financial personalities. Which are you?

Let's uncover more about how your personal style and financial habits intersect.

2 **Take the Retirement Style Assessment**

3 **SEND TO A CLIENT**

you are. Armed with this knowledge, you can work with your financial professional to develop a holistic retirement plan. And then you can focus on what matters most: Doing something you love, with people you love, every day of your life.

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NOTES

1. Closes overlay and returns to parent page

2. Displays first question screen of RSM assessment

3. Launches user's email program with new email populated with subject line, message text and link to the intro screen of RSM assessment

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THE ADVENTURER

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You're bold and gregarious. Your friends describe you as warm, friendly and always on the go. You prefer to be daring, both socially and financially, so it should come as no surprise that you seek adventure. People you don't know aren't strangers; they're just friends you haven't met yet. Sometimes, you think out loud and could benefit from someone with whom you could bounce ideas off of about your future, particularly your financial future.

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How will you spend today 1 START NOW

I CAN BE FEARLESS

Your tendency towards fearlessness and resilience means that you may historically have been comfortable investing in riskier investment options. Work closely with your financial professional to understand how to transition risk in and out of your portfolio over time, particularly as you approach retirement.

I'M A SOCIAL BUTTERFLY

You tend to place a premium on relationships, which is important. But be careful not to make important decisions based solely on factors like rapport and compatibility.

I SEE RISK AS OPPORTUNITY

You see risk – and volatility – as opportunity. Your financial professional will research and vet investment opportunities on your half. Be sure to have a comprehensive conversation with him or her to discuss the potential gains and liabilities.

REEL ME IN (IF YOU MUST)

You see life as a great adventure. You can be quick to say, "Let's do it!," especially when you connect with someone on a personal level. But be sure to thoughtfully consider all of your options before making important decisions about your financial future.

FINANCIALLY SPEAKING

You're a savvy investor and you understand the upside of risk. You recognize that if you want higher returns, you have to accept the thrills and spills that accompany them. You're cool under pressure and have bounced back easily from your past setbacks. You can view volatility as opportunity; you're not afraid to buy when others are selling in fear.

Communicate your need for adventure – and risk – to your financial professional. When it comes to financial planning, you're looking for a trusted partner who can help you create a holistic plan to guide you through the different stages of your life.

2 RETAKE THE TEST | VIEW RECOMMENDED PRODUCTS | SEND TO A CLIENT

NOTES

1. Displays first question of How Will You Spend Today assessment

2. Displays intro screen of RSM assessment

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Home > Practice Matters > Retirement Style Matters

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Retirment Style Matters

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How will you spend today?

Planning for a long time horizon, like retirement, can seem daunting. Let's approach it from a different angle.

Start with something simple: One day. If your retirement began tomorrow, what choices would you make?

1 Get Started

Learn about the four personality styles

Retirement Style Matters is designed to bring clarity and focus to the planning process. The goal is to approach it from a different angle: Personality. Because emotions and behaviors largely impact your financial mindset and habits.

We've identified four different retirement styles, or personalities, that can give you insight into who you are. Armed with this knowledge, you can work with your financial professional to develop a holistic retirement plan. And then you can focus on what matters most: Doing something you love, with people you love, every day of your life.

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NOTES

1. Displays first question of How Will I Spend Today assessment

Retirement Style Matters

Share Print ✕

Sounds like a pretty nice life! Looks like you'll need **about $150 per day!**

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My Retirement Style – The Adventurer

View recommended products 1

You're bold and gregarious. Your friends describe you as warm, friendly and always on the go. You prefer to be daring, both socially and financially, so it should come as no surprise that you seek adventure. People you don't know aren't strangers; they're just friends you haven't met yet. Sometimes, you think out loud and could benefit from someone with whom you could bounce ideas off of about your future, particularly your financial future.

2

More

RETAKE THE TEST 3 SEND TO A CLIENT 4

NOTES

1. Closes overlay and refreshes parent page with Recommended Products screen based on type

2. Expands My Retirement Style to display full text

3. Displays intro screen of RSM assessment

4. Launches user's email program with new email populated with subject line, message text and link to the intro screen of RSM assessment

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- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Forms & Literature

Search Forms & Literature | Search 1

Prospectuses & Reports 2 | Fact Sheets | Enhanced Factsheets | Fund Family Brochures | Fund & Strategy Commentary | White Papers | Practice Matters & Sales Support Materials 3

Cart Summary

1 Fund Name Fact Sheet
1 Fund Name Quarterly Commentary
5 Fund Name Enhanced Fact Sheet
5 Fund Family AA Brochure

EDIT / CHECKOUT 4

Featured Documents

All Funds ▼ 5 | All Portfolio Managers ▼ 6 | Most Recent | Most Popular 7

8 9 10 11 12

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NOTES

1. Enter search term and click search to display results below

2. Click a category to display results below

3. Click arrow to shift category list to the left and display additional categories

4. Links to Shopping Cart

5. Dropdown menu lists all funds. Selecting a fund will display literature related to that fund.

6. Dropdown menu lists all portfolio managers. Selecting a portfolio manager will display literature related to that portfolio manager.

7. Sorts results based on Most Recent or Most Popular. Default sort is Most Recent.

8. Representative image displays

9. Select star to add a document to bookmarks. This functionality is only available to users with an online profile. If the user is not logged in, messaging displays requesting the user log in or create a profile.

10. Title link displays document PDF in new window/tab or links to page

11. Quantity dropdown menu lists quantities. Default is 0.

12. Click to add selected quantity of document to shopping cart. Adding item to cart updates the number next to the cart icon in the header as well as the cart summary.

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Home > Forms & Literature > Shopping Cart Share Print

Shopping Cart

1 **Title** 2
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Quantity: 1 3
Remove 4

Title
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Quantity: 1
Remove

Title
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Quantity: 5
Remove

Title
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Quantity: 5
Remove

UPDATE QUANTITIES 5

NEXT 6

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NOTES

1. Representative image displays
2. Links to document
3. Quantity dropdown displays. Quantity can be adjusted by making a selecting and clicking 'Update Quantities.'
4. Removes item from shopping cart
5. Saves changes made to quantity
6. Links to Shipping Information page

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Home > Forms & Literature > Shopping Cart > Shipping Details Share Print

Shipping Details

Ship to this address 1

Firstname Lastname
123 Test Street
Testtown, XX #####-####
United States
Phone: ###-###-####

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NOTES

1. Links to Confirm Order page

Confirm Order

Shipping Address

Firstname Lastname
123 Test Street
Testtown, XX #####-####
United States
Phone: ###-###-####

Order Summary

1 Fund Name Fact Sheet
1 Fund Name Quarterly Commentary
5 Fund Name Enhanced Fact Sheet
5 Fund Family AA Brochure

SUBMIT ORDER 1

NOTES

1. Links to Order Confirmed page

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Home > Forms & Literature > Thank You Share Print

Thank You

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Recommended Link > 1
Recommended Link >

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NOTES

1. Links to Manage My Profile > My Literature Orders

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2 Financial Advisors
3 RIA's & Research Analysts
4 Institutional
5 DCIO
6 Individuals

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Contact RS Investments: 800-766-3863

San Francisco
388 Market Street, Suite 1700
San Francisco, CA 94111
415-591-2700

7 Directions to RS Investments, San Francisco

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NOTES

1. General Contact Information displays by default.
2. Links to Financial Advisors contact information
3. Links to RIA/RA contact information
4. Links to Institutional contact information
5. Links to DCIO contact information
6. Links to Individuals contact information
7. Links to Google Maps location in new window

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- Individuals

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RS Investments Institutional Services professionals are available to consult with you. Each member of our team understands the value of an open, ongoing dialogue with our clients. We understand the unique needs of your business and are here to serve you and your clients:
Please call: 800-766-3863, Option 2 institutional@rsinvestments.com

Tom Neukranz
415-591-2809
tneukranz@RSinvestments.com

Tom Neukranz is Head of Institutional Strategy, Development and Sales. He is responsible for directing all distribution efforts for RS Investments' institutional business. Prior to joining RS Investments in June 2021, Tom held senior leadership positions in institutional sales at ING Investment Management, JP Morgan, and was global head of exchange traded derivitive sales at Goldman Sachs. Tom earned a BSIM from Purdue University.

Asset Consultants

David Elliott
Principal
415-591-2732
delliott@RSinvestments.com

David M. Elliott is a Principal at RS Investments and is a senior member of the Institutional Services team, which serves the Firm's institutional and intermediary clients. He is responsible for maintaining certain client and consultant relationships. David joined RS in 1995 and established the Firm's presence in institutional, 401(k), and subadvisory markets. Prior to joining RS, he spent 11 years at Fidelity Investments, where he was responsible for Pension and 401(k) relationships. He received a B.A. from the University of New Hampshire.

Corporations, Public Funds, and Taft-Hartley Plans

Joe Fague, CFA
Vice President
415-591-2815
jfague@RSinvestments.com

Joe Fague is vice president, Institutional Services and is responsible for establishing and maintaining institutional client and consultant relationships. Prior to joining RS Investments in August 2003, Joe worked with high net worth and institutional clients while with Strong Capital Management and Jurika & Voyles. Joe earned a B.S. from Georgetown University cum laude and is a CFA Charterholder.

NOTES

1. Selected link is inactive

2. Launches new message in user's email program

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1 Overview

2 Opportunities

3 Benefits

Careers

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Workplace & Culture

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4 Link to testimonials

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NOTES

1.Selecting Careers default to Overview screen. Selected link is inactive.

2. Links to Opportunities page

3. Links to Benefits page

4. Links to Testimonials page

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Home > Careers > Opportunities

I want to....

- Overview
- 1 Opportunities
- Benefits

Opportunities

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2 Position 1 Title

Position 2 Title

Position 3 Title

Position 4 Title

Position 1 Full Description

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3 Email resume

Position 2 Full Description

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RSM Marketing

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NOTES

1. Opportunities link is selected to display Opportunities page

2. Anchor link to Position Information below

3. Launches new email with recipient address prepopulated in user's email program

Contact Us | **Careers**

RS|investments

Financial Advisors ▼

Ticker or Keyword [Search]

Welcome Mary Smith | Sign Out (2)

Home	**Funds & Performance**	**Research Insights**	**Practice Matters**	**Forms & Literature**	**Our Firm**

Home > Careers > Benefits

▸ I want to….

- Overview
- Opportunities
- 1 Benefits

Benefits

Share Print

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus lacus urna, fermentum in molestie quis, euismod ac diam. Cras cursus nunc nec urna consequat tempor. In non dolor eget purus pretium pulvinar. Cras ac tincidunt tortor. Donec vel erat in est consectetur imperdiet suscipit varius felis. Vivamus porta quam vitae elit congue pharetra. Nunc ut leo nisl.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus lacus urna, fermentum in molestie quis, euismod ac diam. Cras cursus nunc nec urna consequat tempor. In non dolor eget purus pretium pulvinar. Cras ac tincidunt tortor. Donec vel erat in est consectetur imperdiet suscipit varius felis. Vivamus porta quam vitae elit congue pharetra. Nunc ut leo nisl.

NOTES

1.Benefits link is selected to display Benefits page

Contact Us | Careers

RS | investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

Home > Our Firm Share Print

I want to....

1 Overview
2 Leadership
3 Locations
4 Press

Our Firm

Dedicated Investment Management and Research Approach

At the core of our business are multiple world-class investment management and research teams, each operating autonomously and offering our clients their unique perspectives. Staffed with experienced professionals, each team researches and pursues investment opportunities consistent with its particular style and practices disciplined and well-defined investment processes. The dedicated research team approach assures that our clients benefit from process consistency, investment excellence, and choice across disciplines.

RS Facts

- Founded in 1986 as the asset management arm of Robertson Stephens & Company
- $2.18 billion in assets under management*
- Significant employee ownership
- Offices in San Francisco, Chapel Hill, and New York

Our People

At RS Investments, we believe our people and their processes are what set us apart. By building on a foundation of quality individuals, with exceptional educational backgrounds, extensive investment experience, and a wide variety of professional experience and knowledge, we have established a most remarkable organization.

Distinct and Specialized Investment Teams

	Value	Core Growth	Growth	International	Natural Resources	Fixed Income
Assets Under Management *	$12.7 billion	$203 million	$2.0 billion	$2.7 billion	$3.2 billion	$4.3 billion
Investment Professionals	14	5	8	21	7**	35
Average Years Experience	16	17	15	13	21**	20

* Assets under management reported as of March 31, 2021
**Natural Resources team member and AUM information is also included in the Value team member and AUM figures
1 Sub-sub-advised by Baillie Gifford Overseas Limited
2 Sub-advised by Guardian Investor Services LLC

NOTES

1. Overview of Firm information displays by default.

2. Links to Leadership

3. Links to Locations

4. Links to Press

Contact Us | Careers

RS|investments

Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | **Funds & Performance** | **Research Insights** | **Practice Matters** | **Forms & Literature** | **Our Firm**

Home > Our Firm > Leadership

Share Print

I want to....

- Overview
- 1 Leadership
- Locations
- Press

Leadership

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed feugiat tortor dolor.

Management Team 2 **Investment Team** 3 **Trustees** 4

5

Firstname, Lastname
Title
XX Years With RS Investments

Biography
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula vehicula. Vestibulum sit amet arcu vitae lectus ultrices varius nec quis tellus. Aliquam erat volutpat.

6

Firstname, Lastname
Title

Firstname, Lastname
Title

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. Leadership link is selected to display Leadership page

2. Management Team section is selected by default.

3. Links to Investment Team view. Layout is same as Management Team.

4. Links to Client Service Team view.

4. Links to Trustees view. Layout is same as Client Service Team view.

5. Management team members are listed. All bios are closed by default. Clicking the arrow or photo opens and closes that section. This represents an 'open' version of a bio.

6. 'Closed' bio shows photo, first and last name and title.

Contact Us | Careers

RS|investments

Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home	**Funds & Performance**	**Research Insights**	**Practice Matters**	**Forms & Literature**	**Our Firm**

Home > Our Firm > Locations

Share Print

I want to....

- Overview
- Leadership
- 1 Locations
- Press

Locations

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec ullamcorper, nisl pellentesque tristique ultrices, lectus leo tempus quam, sed feugiat tortor dolor.

San Francisco
388 Market Street, Suite 1700
San Francisco, CA 94111
2 Directions to RS Investments, San Francisco

For general inquiries, please contact
<Firstname Lastname> at **415-591-2700**

New York City
7 Hanover Square
New York, NY 10004
3 Directions to RS Investments, New York City

For general inquiries, please contact
<Firstname Lastname> at ###-###-####

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. Locations link is selected to display Locations page

2. Links to Google Maps location in new window

3. Links to Google Maps location in new window

Contact Us | Careers

RS|investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | **Our Firm**

Home > Our Firm > Press Share Print

I want to....

- Overview
- Leadership
- Locations
- 1 Press

Press

About RS Investments

About RS Investments statement for the press. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula vehicula. Vestibulum sit amet arcu vitae lectus ultrices varius nec quis tellus.

Press Releases

2012

September 13, 2021

2 **RS Investments Further Deepens Value Research Team**

Experienced analysts covering financials and hard assets join RS

San Francisco - RS Investments, a San Francisco-based investment management firm, today announced the addition of two experienced equity analysts, Andy Walker, CFA, and Paul Hamilos, CFA, to the RS Value Team.

August 23, 2021

RS Investments Adds Experienced Analysts to Core Growth Team

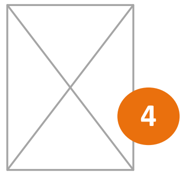
San Francisco - RS Investments today announced that Todd D. Young and Brad A. Meeks have joined the RS Core Growth Team based in Chapel Hill, North Carolina as equity research analysts.

Media Contact

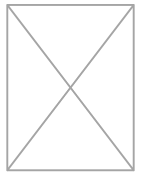
To schedule an interview with one of our portfolio managers, or for general media inquiries on RS Investments, please contact:

Pat Harden
Office: (415) 591-2751
3 pharden@rsinvestments.com

In the News



August 2021
FA Magazine
4 **Natural Selection**
RS Global Natural Resources Fund



2021
Lipper Fund Awards
United States
RS Large Cap Alpha Fund Recognized by Lipper as
Best Fund in the Large-Cap Core Fund Category for the 5-year period
[1]

NOTES

1. Press link is selected to display Press page
2. Links to Press Release PDF in new window/tab
3. Launches new email with recipient address prepopulated in user's email program
4. Links to external page in new tab/ window

Contact Us | Careers

RS|investments

Financial Advisors

Ticker or Keyword | Search

Log In | Need an online profile? **Register**

Home	Funds & Performance	Research Insights	Practice Matters	Forms & Literature	Our Firm

Home > Create Your Profile

Share | Print

Create Your Profile

Already have a profile? Log In now 1

- Company 2
- First Name 3
- Last Name 4
- Street Address 1 5
- Street Address 2 6
- City 7
- State 8 Select
- Zip Code 9
- Phone Number 10
- Professional Email 11
- Select a Username 12
- Password 13
- Re-type Password 14
- Security Question 15 Select a Question
- Answer 16

17 ☐ I would like to be able to submit literature/print orders

18 ☐ I accept the RS Investments Disclaimer and Terms of Use.

19 ☐ Remember me on this computer

Register 20

Why Register?

- Order literature quickly and easily
- Subscribe to your favorite content
- Lorem ipsum lorem ipsum
- Lorem ipsum lorem ipsum

Contact Us

If you need Log In or Registration help, or have questions about your profile, contact us. 21

Home | Privacy Policy | Glossary | Careers | Press | Business Continuity

NOTES

1. Links to Log in
2. Company text box. Required.
3. First name text box. Required.
4. Last name text box. Required.
5. Street address 1 text box. Required.
6. Street address 2 text box. Not required.
7. City text box. Required.
8. State dropdown menu. Required.
9. Zip code text box. Required.
10. Phone number text box. Required.
11. Email address text box. Required.
12. Select a username text box. Required.
13. Select a password text box. Required.
14. Re-enter password text box. Required.
15. Security question dropdown menu. Required.
16. Answer text box. Required.
17. Submit literature checkbox. Defaults to unchecked.
18. Disclaimer checkbox. Defaults to unchecked. Disclaimer links to text document in new window/tab.
19. Remember me checkbox. Defaults to unchecked.
20. Register button submits form and if valid, displays Registration Complete.
21. Launches new email with recipient address prepopulated in user's email program

Contact Us | Careers

RS|investments

Financial Advisors

Ticker or Keyword Search

Log In Need an online profile? **Register**

Home | **Funds & Performance** | **Research Insights** | **Practice Matters** | **Forms & Literature** | **Our Firm**

Home > Create Your Profile

Share Print

Create Your Profile

Already have a profile? Log In now

1

In order to <utilize tool, e.g. "find a wholesaler">, you must have an online profile. Please fill in the fields below and you will be directed to your wholesaler. If you have already created a profile, Log In now.

Company

First Name

Last Name

Street Address 1

Street Address 2

City

State Select

Zip Code

Phone Number

Professional Email

Select a Username

Password

Re-type Password

Security Question Select a Question

Answer

- [ ] I would like to be able to submit literature/print orders
- [ ] I accept the RS Investments Disclaimer and Terms of Use.
- [ ] Remember me on this computer

Register

Why Register?

- Order literature quickly and easily
- Subscribe to your favorite content
- Lorem ipsum lorem ipsum
- Lorem ipsum lorem ipsum

Contact Us

If you need Log In or Registration help, or have questions about your profile, contact us.

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. Message displays when user elects to register in order to utilize a specific tool.

Contact Us | Careers

RS|investments **Financial Advisors**

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | **Funds & Performance** | **Research Insights** | **Practice Matters** | **Forms & Literature** | **Our Firm**

Home > Registration Complete Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Registration Complete

Thank you for registering. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc hendrerit bibendum purus in tempor. Aenean quis massa nisi. Sed odio eros, dignissim sed luctus ac, varius eu magna.

Suggested link tbd > 1
My Profile >

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. If user has initiated registration not through a tool, this confirmation page displays.

Contact Us | Careers

RS | investments

Financial Advisors

Ticker or Keyword Search

Log In Need an online profile? **Register**

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

Share Print

Home > Create Your Profile

Create Your <Type> Profile

Already have a profile? Log In now

Company*

(based

1

Thank you for creating your profile.

You are being directed to your wholesalers.

Phone Number*

Professional Email*

Re-type Professional Email*

Password*

Re-type Password*

Security Question* Select a Question

Answer*

*required

- I would like to be able to submit literature/print orders
- I accept the RS Investments Disclaimer and Terms of Use.
- Remember me on this computer

Register

Why Register?

- Order literature quickly and easily
- Subscribe to your favorite content
- Lorem ipsum lorem ipsum
- Lorem ipsum lorem ipsum

Contact Us

If you need Log In or Registration help, or have questions about your profile, contact us.

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. Message displays when user submits registration form in order to utilize a specific tool. Message closes automatically and parent page refreshese to destination page based on tool selected. For example, for Find a Wholesaler, the displaying page will be Manage My Profile > My Sales Team

Individual Investors Contact Us | Careers

RS | investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

Home > Manage My Profile Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Manage My Profile

1 2 3 4 5 6

My Funds | My Bookmarks | My Sales Team | My Subscriptions | My Literature Orders | My Profile Information

My Funds

Lorem ipsum dolor sit amet, consect 8 entum in molestie quis, euismod ac diam.

et Asset Value (NAV): NAV per share is computed once a day based on the closing market prices of the securities in the fund's portfolio. All mutual fund's buy and sell orders are processed at the NAV of the trade date.

7

Fund Name	Ticker	? NAV ($)	NAV change (%)	YTD as of 11/17/12 (%)	Date Added to My Funds	10
9 Fund Name (with Share Class)	$XX.XX	XX.XX	xx.xx	xx.xx	dd/mm/yyyy	⊗
Fund Name (with Share Class)	$XX.XX	XX.XX	xx.xx	xx.xx	dd/mm/yyyy	⊗
Fund Name (with Share Class)	$XX.XX	XX.XX	xx.xx	xx.xx	dd/mm/yyyy	⊗
Fund Name (with Share Class)	$XX.XX	XX.XX	xx.xx	xx.xx	dd/mm/yyyy	⊗

NOTES

1. My Funds is selected and list of funds displays.

2. Click to display My Bookmarks

3. Click to display My Sales Team

4. Click to display My Subscriptions

5. Click to display My Literature Orders

6. Click to display My Profile Information

7. Column headings sort results by alpha, numerical order or by date.

8. Hover over icon to display glossary data in overlay.

9. Fund name links to Fund Overview page

10. Click to remove fund from the list

Individual Investors Contact Us | Careers

RS | investments

Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home	Funds & Performance	Research Insights	Practice Matters	Forms & Literature	Our Firm

Home > Manage My Profile

Share Print

▾ I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Manage My Profile

1

My Funds | **My Bookmarks** | My Sales Team | My Subscriptions | My Literature Orders | My Profile Information

My Bookmarks

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus lacus urna, fermentum in molestie quis, euismod ac diam.

2 EMAIL TO A CLIENT

3

Name	Date Added	
☐ Document Name 4	dd/mm/yyyy	✖ 5
☐ Page Name	dd/mm/yyyy	✖
☐ E-book Name	dd/mm/yyyy	✖
☐ Document Name	dd/mm/yyyy	✖

NOTES

1. My Bookmarks is currently selected and inactive

2. User selects checkbox of one or more documents in the list and clicks Email to a Client button. User's email program launches with new email populated with subject line, message text and link(s) to selected document(s).

3. Column headings sort results by alpha or by date.

4. Documents display sorted by most recently added by default

5. Click to remove item from the list

Individual Investors Contact Us | Careers

RS | investments **Financial Advisors**

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | **Funds & Performance** | **Research Insights** | **Practice Matters** | **Forms & Literature** | **Our Firm**

Home > Manage My Profile Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Manage My Profile

1

My Funds | My Bookmarks | **My Sales Team** | My Subscriptions | My Literature Orders | My Profile Information

My Sales Team

EXTERNAL

Firstname, Lastname

Contact information including phone

SEND AN EMAIL 2

Biography

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula vehicula. Vestibulum sit amet arcu vitae lectus ultrices varius nec quis tellus. Aliquam erat volutpat.

INTERNAL WHOLESALER

Firstname, Lastname

Contact information including phone

SEND AN EMAIL

Biography

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula vehicula. Vestibulum sit amet arcu vitae lectus ultrices varius nec quis tellus. Aliquam erat volutpat.

NOTES

1. My Sales Team is currently selected and inactive

2. Launches new email with recipient address prepopulated in user's email program

Individual Investors Contact Us | Careers

RS|investments **Financial Advisors**

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | **Funds & Performance** | **Research Insights** | **Practice Matters** | **Forms & Literature** | **Our Firm**

Home > Manage My Profile Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Manage My Profile

My Funds | My Bookmarks | **My Sales Team** | My Subscriptions | My Literature Orders | My Profile Information

My Sales Team

1

Thank you for registering. You'll find your wholesaler information below. It will always be accessible to you when you are logged in to your online profile.

EXTERNAL

Firstname, Lastname

Contact information including phone

SEND AN EMAIL

Biography

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula vehicula. Vestibulum sit amet arcu vitae lectus ultrices varius nec quis tellus. Aliquam erat volutpat.

INTERNAL WHOLESALER

Firstname, Lastname

Contact information including phone

SEND AN EMAIL

Biography

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque ornare urna ut tortor vehicula

NOTES

1. Messaging displays for users who arrive at this page following registration initiated via a tool (e.g. Find a Wholesaler)

Individual Investors Contact Us | Careers

RS|investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

Home > Manage My Profile Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Manage My Profile

1

My Funds | My Bookmarks | My Sales Team | **My Subscriptions** | My Literature Orders | My Profile Information

My Subscriptions

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus lacus urna, fermentum in molestie quis, euismod ac diam.

2

Fund Subscriptions	subscribe		subscribe
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	
Fund name		Fund name	

Res. Insights Subscriptions	subscribe
Commentary	
Magazines	
Whitepapers	
Video	
Webcasts	

Portfolio Manager Subscriptions	subscribe		subscribe
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	
Manager name		Manager name	

NOTES

1. My Subscriptions is currently selected and inactive

2. Select checkbox to subscribe. Currently subscribed items will display as checked. Others display unchecked.

Individual Investors Contact Us | Careers

RS|investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

Home > Manage My Profile Share Print

I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

RSM Marketing

Manage My Profile

1

My Funds | My Bookmarks | My Sales Team | My Subscriptions | **My Literature Orders** | My Profile Information

Literature Ordering – Status & History

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus lacus urna, fermentum in molestie quis, euismod ac diam.

2

	Order Number	Order Contents	Date Added
▶	000-0000	Order Contents...	dd/mm/yyyy
▶	000-0000	Order Contents...	dd/mm/yyyy
▶	000-0000	Order Contents...	dd/mm/yyyy
▼	000-0000	Order Contents...	dd/mm/yyyy

Document title document title document
Quantity: 4

Document title document title document
Quantity: 1

3 Order again

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. My Literature Orders is currently selected and inactive

2. Select arrow to expand row. Click again to collapse row.

3. Order again links to shopping cart page with previous order's items prepopulated

Individual Investors Contact Us | Careers

RS|investments **Financial Advisors** ▼

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home	Funds & Performance	Research Insights	Practice Matters	Forms & Literature	Our Firm

Home > Manage My Profile Share Print

▼ I want to....

- Manage My Online Profile & Subscriptions
- Speak with My Sales Team
- View My Funds
- View My Bookmarks
- Get Fund Performance Information
- Order Literature
- Get Sales Ideas to share with my Clients
- Get Practice Building content for my education

Manage My Profile

1

My Funds | My Bookmarks | My Sales Team | My Subscriptions | My Literature Orders | **My Profile Information**

Compan 2 Wealth Management Inc.

First Name 3 Mary

Last Nam 4 Smith

Street Address 5 41 Washington

Street Address 2 6 41 Washington

Cit 7 Newark

Stat 8 New Jersey

Zip Cod 9 07111

Phone Numbe 10 ###-###-####

Professional Ema 11 xxxxxxx@xxxxxx.xxx

Lorem ipsum change password...

Usernam 12 XXXXXXXXXX

Passwor 13 ********

Re-type Passwor 14

Security Questio 15 Select a Question

Answe 16 ########

17 Cancel 18 Save

Home Privacy Policy Glossary Careers Press Business Continuity

NOTES

1. My Profile Information is currently selected and inactive. This is the default view when user selects name in global navigation.

2. Company populated text box

3. First name populated text box

4. Last name populated text box

5. Street Address 1 populated text box

6. Street Address 2 populated text box if applicable

7. City populated text box

8. State populated dropdown menu

9. Zip code populated text box

10. Phone number populated text box

11. Professional email populated text box

12. Username displays in text. Not editable.

13. Password populated text box

14. Password field left blank until user enters new password and is required to re-enter to change it

15. Security question dropdown menu

16. Answer populated text box

17. Cancel changes and revert to previous version of same page

18. Save submits changes and confirmation messaging displays

Contact Us | Careers

RS|investments Financial Advisors

Ticker or Keyword Search

Welcome Mary Smith | Sign Out (2)

Home | Funds & Performance | Research Insights | Practice Matters | Forms & Literature | Our Firm

Home > Funds & Performance > The Connector

Share Print

I want to....

1

Recommended Products – The Connector

See other recommendations The Connector Go

Quisque odio ante, eleifend sed sollicitudin sit amet, vehicula sit amet velit. Quisque urna mi, pharetra sed semper sed, scelerisque quis neque. Ut sit amet convallis leo. Cras at leo magna.

All Shares | Without Sales Load | Without Index

Month End | Quarter End
As of 10/31/2012

ADD TO MY FUNDS | GET FACT SHEET(S)

Export to Excel

2

Fund Name	Ticker	Inception Date	YTD as of 11/17/11 (%)	1YR (%)	3YR (%)	5YR (%)	10YR (%)	Since Incep. (%)	Gross/Net Exp. Ratio	Fiscal Year End
Equity - US										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Equity – Non US & Global										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Fixed Income										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
Alternatives										
<Fund Name>	<TCKR>	dd/mm/yyyy	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	xx.xx%	dd/mm/yyyy
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NOTES

1. This page is accessed when a user views recommended funds from within Manage My Account > My Client Profiles. Dropdown menu defaults to the currently viewed type, with the option to view other types. Types are: Connector, Seeker, Analyst, Adventurer Selecting another type will refresh this page.

2. Relevant funds and fund categories display.

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About 698 results (0.19 seconds)

1

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1 2 3 4 5 6 7 8 9 10 2

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2. Search results pagination displays

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30-Day SEC Yield

The 30-day SEC standardized yield represents net investment income earned by a fund over a 30-day period, expressed as an annual percentage rate based on the fund's share price at the end of the 30-day period. The formula for calculating this yield is specified by the U.S. Securities and Exchange Commission (SEC) and assumes all portfolio securities are held until maturity. The formula translates the bond fund's current portfolio income into a standardized yield for reporting and comparison purposes.

Alpha

A statistical measurement used to quantify the value added or subtracted by a portfolio manager. Specifically, alpha measures the portfolio's actual return against the portfolio's expected return given the risk of the portfolio as defined by its beta. Alpha is one of the three MPT (Modern Portfolio Theory) statistics and is derived by a linear regression of the portfolio's returns against the returns of a benchmark.

An important observation when using alpha is to know how accurately the portfolio beta reflects the market risk of the portfolio. The confidence with which one can have in an alpha (and beta) depends entirely on how strong the linear relationship is between the portfolio and the benchmark. A strong relationship is characterized by a high R2. As the value of the R2 decreases, the alpha for a portfolio becomes meaningless.

Annualized Return

Returns are calculated for each fund or composite by geometrically linking either monthly or quarterly performance for a specific period. This compounded total return is then annualized.

Beta

A statistical measurement of a portfolio's relative sensitivity to the benchmark, which acts as a proxy for market risk. The beta between a portfolio and its benchmark is the amount of units the portfolio will move when the benchmark moves one unit. By definition, the beta of the market (benchmark) is one. Beta is one of the three MPT (Modern Portfolio Theory) statistics and is derived by a linear regression of the portfolio's returns against the returns of a benchmark.

For example, if a portfolio has a beta of 1.15, it is expected that the portfolio will perform 15% better than the benchmark in an up market. However, in a down market it is expected that the portfolio would perform 15% worse than the benchmark.

It is important to note that beta is only an estimate. For a beta to be most accurate, a perfect linear correlation (in the form of an R2 equal to 1) must exist between the portfolio and the benchmark. As the value of the R2 decreases, the beta for a portfolio becomes immaterial.

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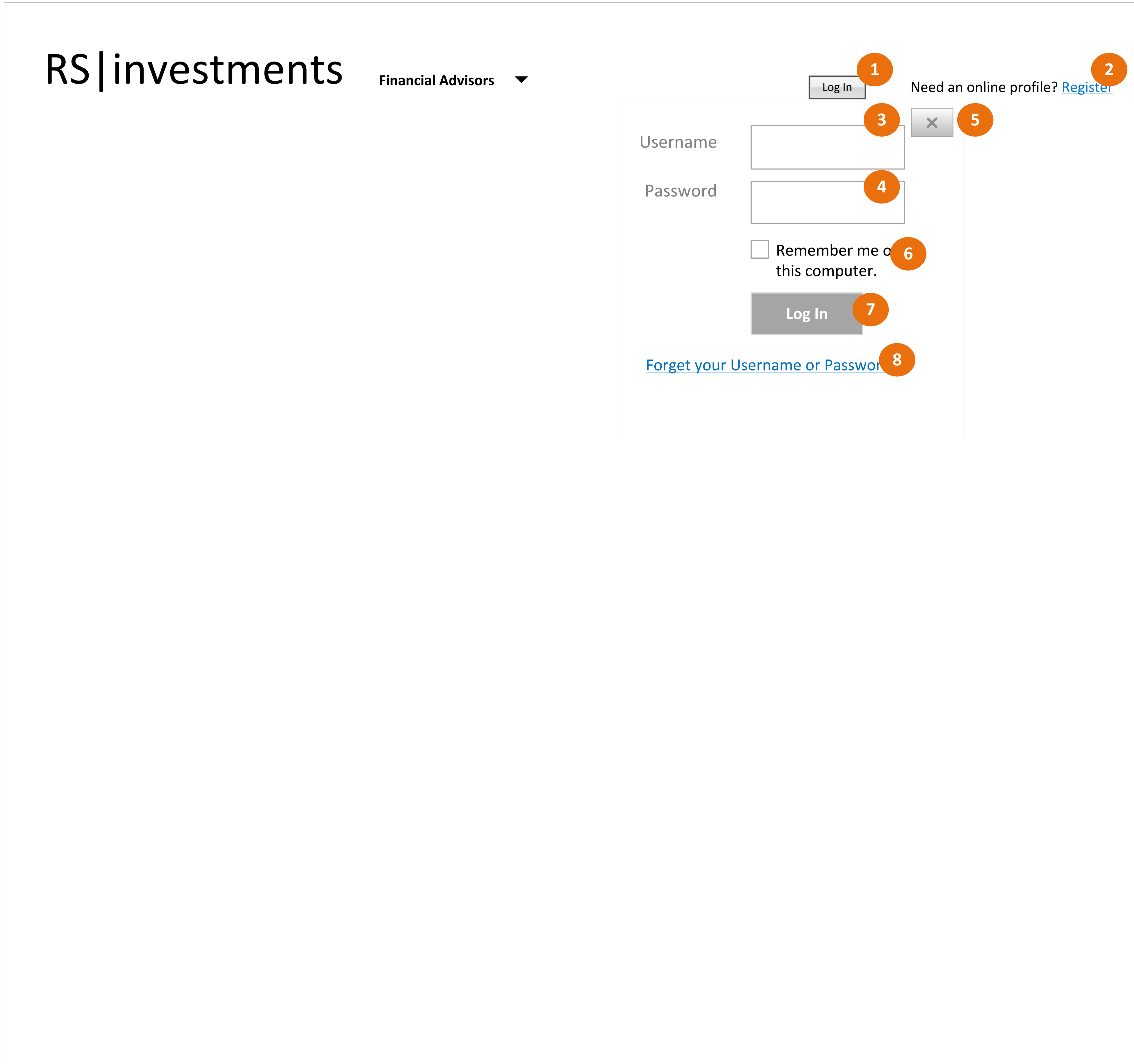
2. Links to Registration page

3. Link to close window



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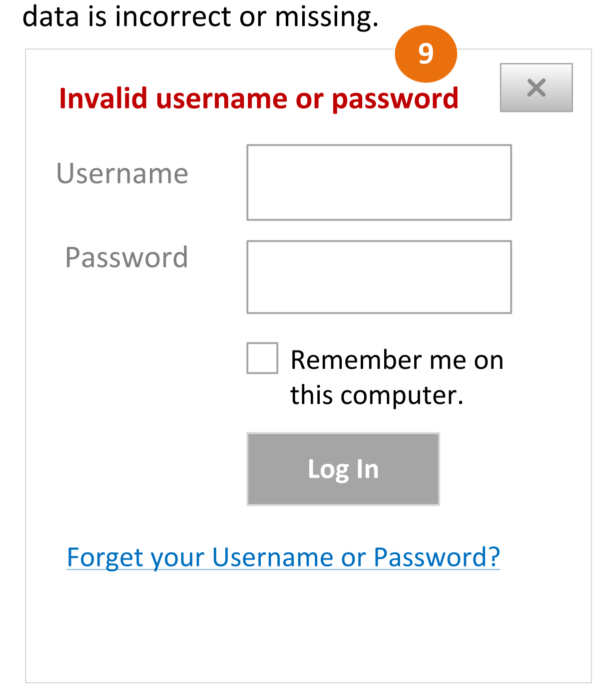

1. Click to display login module.
2. Links to Registration page
3. Link to close window
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6. Remember me checkbox defaults to unchecked
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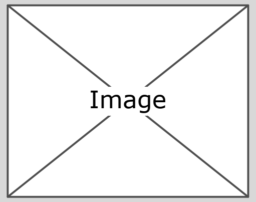

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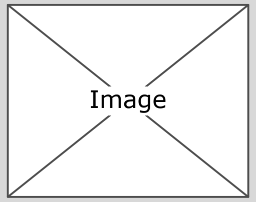

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