

Zephyr's PSN

New Products and Managers

Informa Financial Intelligence understands the importance of complete and up-to-date information. New Products and Managers are identified in bold inside of PSN Enterprise, but this quarterly reference guide makes it even easier to see the latest additions. This listing identifies all new products, from both new and existing managers, and the date they entered PSN. Newly added managers are identified with an asterisk. (*).

Summary

Total New Products	203
Total New Managers	10
New Products from Existing Managers	170

Manager Name	Product Name	Date Added
3EDGE Asset Management LP		
	3EDGE Conservative Strategy	6/16/2020
Acorn Financial Advisory Services In*		
	strategicALPHA Opportunities	6/5/2020
AllianceBernstein L.P.		
	AB European Value	4/8/2020
	AB Eurozone Strategic Value	4/8/2020
Applied Finance Capital Mgmt., LLC		
	Valuation Delta	6/3/2020
Artisan Partners Limited Partnership		
	Artisan Small Cap Growth Trust Tier1	5/11/2020
Baird Advisors		
	Municipal Bond	4/28/2020
	Strategic Municipal Bond	4/28/2020
Ballast Equity Management, LLC*		
	Ballast Quality Value Midcap	4/8/2020
	Ballast Quality Value Smallcap	4/8/2020
	Ballast Select Value	4/28/2020
Bares Capital Management, Inc.		
	Bares Capital Mid-Large Cap	6/11/2020
Barrow, Hanley, Mewhinney & Strauss		
	All Country World ex-U.S. Value	4/13/2020
	Bank Loan	5/11/2020
	Concentrated Emerging Markets	4/13/2020
	Concentrated Global Opportunities	6/11/2020
	Enhanced Intermediate Credit	6/11/2020
	Global Value Dividend	5/11/2020
	U.S. ESG Value Equity	4/13/2020
Blueprint Investment Partners LLC		
	Blueprint US ESG Select	6/11/2020

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Brinker Capital Inc		
	Destinations Agg Equity Tax-Aware	5/8/2020
	Destinations Aggressive Equity	5/8/2020
	Destinations ETFh Agg Eq Tax-Aware	5/8/2020
	Destinations ETFh Aggressive Equity	5/8/2020
	Destinations ETFh Consrv Tax-Aware	5/8/2020
Bullseye Asset Management LLC*		
	Bullseye Small Cap Growth Strategy	4/28/2020
Burke Wealth Management*		
	Focused Growth	4/13/2020
Calvert Research and Management		
	Calvert Dev. Ex-U.S. Responsible	6/5/2020
	Calvert Equity	6/5/2020
	Calvert Global Water	6/5/2020
	Calvert Income	6/5/2020
	Calvert International Opportunities	6/5/2020
	Calvert Mid-Cap Strategy	6/5/2020
	Calvert Responsible Municipal Income	6/5/2020
	Calvert US LCG Responsible Index	6/5/2020
	Calvert US LCV Responsible Index	6/5/2020
	Calvert US MCC Responsible Index	6/5/2020
CIBC Asset Management		
	Active Currency Overlay	5/18/2020
Columbia Management Investments		
	Wanger Intl Small-Cap Developed	6/3/2020
Congress Asset Management Company		
	SMid Growth	4/28/2020
Conning, Inc.		
	Corporate Bond	4/13/2020
	Securitized	4/13/2020
Cushing Asset Management, LP		
	Cushing SMID Growth Focused Fund	5/13/2020
Delaware / Macquarie		
	Macquarie US Interm (1-10) Muni SMA	4/8/2020
DWS		
	DWS Global Infrastructure Strategy	5/27/2020
EAM		
	EAM Equity Income	5/27/2020
	EAM Sector Rotation	5/27/2020
	EAM Sustainable Equity	5/27/2020

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Evolutionary Tree Capital Management*		
	Beagle Leading Innovators Strategy	4/27/2020
	Humboldt Global Innovators	6/16/2020
F L Putnam Investment Management Co.		
	Fossil Fuel Free-Low Carbon	6/25/2020
	Sustainable Opportunities	6/25/2020
First Trust Advisors, L.P.		
	FT Multi Income Asset Allocation ETF	6/11/2020
	FT RBA US Equity ETF	6/12/2020
Franklin Templeton Investments		
	Franklin Dynatech SMA Composite	4/24/2020
GW&K Investment Management, LLC		
	2-8 Year Active Municipal Bond ESG	4/8/2020
	Core Bond ESG Strategy	4/8/2020
	Emerging Markets Equity ADR Strategy	4/8/2020
	Emerging Wealth Equity ADR Strategy	4/8/2020
	Enhanced Core Bond ESG Strategy	4/8/2020
	Municipal Bond ESG Strategy	4/8/2020
Heard Capital*		
	Heard High Conviction Long Only Fund	4/28/2020
	Heard Opportunity Fund	4/28/2020
IndexIQ Advisors LLC.		
	IQ Candriam ESG International Equity	4/28/2020
	IQ Candriam ESG U.S. Equity ETF	4/28/2020
John Hancock Investment Management		
	Core Bond SMA	4/13/2020
	Core Plus Bond SMA	4/13/2020
	JH Global Dynamic Equity Model	4/24/2020
	JH Multi Asset Income Model	4/24/2020
	JH Multimanager Act/Pass Aggressive	4/24/2020
	JH Multimanager Act/Pass Balanced	4/24/2020
	JH Multimanager Act/Pass Conservativ	4/24/2020
	JH Multimanager Act/Pass Growth	4/24/2020
	JH Multimanager Act/Pass Moderate	4/24/2020
	JH Multimanager Aggressive Model	4/24/2020
	JH Multimanager Balanced Model	4/24/2020
	JH Multimanager Conservative Model	4/24/2020
	JH Multimanager ETF Balanced Model	4/24/2020
	JH Multimanager ETF Conservative Mod	4/24/2020
	JH Multimanager ETF Growth Model	4/24/2020

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	JH Multimanager ETF Moderate Model	4/24/2020
	JH Multimanager Growth Model	4/24/2020
	JH Multimanager Moderate Model	4/24/2020
	JH Multimanager ETF Aggressive Model	4/24/2020
Kayne Anderson Rudnick Invst.		
	KAR Long/Short	5/27/2020
	Virtus KAR Long/Short Equity Fund	5/27/2020
Level Four Capital Management, LLC*		
	International	4/13/2020
	US Large Cap Growth	4/13/2020
	US Large Cap Value	4/13/2020
Liberty One Investment Management*		
	CAPSTONE	4/13/2020
	Spectrum	4/13/2020
	Tactical Growth Solution	4/13/2020
	Tactical Income Solution	4/13/2020
Loomis, Sayles & Company, L.P.		
	Government Only Managed Account	5/27/2020
	Short Government Managed Account	5/27/2020
Mairs & Power Inc		
	Mairs & Power Balanced Strategy	4/28/2020
	Mairs & Power Small Cap Strategy	4/28/2020
Merlin Asset Management		
	Merlin SMID Cap Growth Equity SMID50	4/13/2020
Mesirow Financial Investment Mgmt.		
	Mesirow Financial Bank Loan	5/27/2020
Millrace Asset Group, Inc.		
	Millrace Capital LP	4/28/2020
Morgan Stanley Investment Management		
	Developing Opportunity	4/13/2020
Nationwide Fund Advisors*		
	Nationwide AllianzGI International	4/13/2020
	Nationwide Amundi Global High Yield	4/13/2020
	Nationwide Amundi Strategic Income	4/13/2020
	Nationwide Core Plus Bond Fund	4/13/2020
	Nationwide Diamond Hill Lg Cp Cnctr	4/13/2020
	Nationwide Fund	4/13/2020
	Nationwide Geneva MidCap Growth Fund	4/13/2020
	Nationwide Geneva SmallCap Growth Fd	4/13/2020
	Nationwide Global Sustainable Equity	4/13/2020

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	Nationwide International Small Cap	4/13/2020
	Nationwide Loomis All Cap Growth	4/13/2020
	Nationwide Loomis Core Bond	4/13/2020
	Nationwide Loomis Short Term Bond	4/13/2020
	Nationwide Mellon Dynamic US Core	5/13/2020
	Nationwide WCM Small Cap Core Fund	4/13/2020
Northern Trust Asset Management		
	Divers Strat Port Qual Low Vol GI	6/11/2020
	Divers Strat Port Qual Low Vol GMI	6/11/2020
	Divers Strat Port Qual Low Vol IMG	6/11/2020
	Divers Strat Port Qual Low Vol INC	6/11/2020
	Divers Strat Port Qual Low Vol MG	6/11/2020
	DSP Tax Sensitive Qual Low Vol GI	6/11/2020
	DSP Tax Sensitive Qual Low Vol GMI	6/11/2020
	DSP Tax Sensitive Qual Low Vol IMG	6/11/2020
	DSP Tax Sensitive Qual Low Vol INC	6/11/2020
	DSP Tax Sensitive Qual Low Vol MG	6/11/2020
	Northern Trust Intermediate Duration	6/11/2020
Oberweis Asset Mgmt, Inc.		
	International Select	5/27/2020
Pacific Investment Mgmt. Co		
	StocksPLUS Small AR	5/27/2020
Palisade Capital Management, LLC		
	Focused All Cap Equity	6/4/2020
	Short Duration Convertible Bond	6/4/2020
Potomac Fund Management		
	Focused Growth	5/13/2020
Principal Global Equities		
	Dynamic International Equity	5/11/2020
	Global Small Cap Equity	5/11/2020
	International Equity Index	5/11/2020
	International Opportunities Equity	5/11/2020
Principal Life Insurance Company		
	Principal Lifetime Hybrid 2010 CIT	5/11/2020
	Principal Lifetime Hybrid 2015 CIT	5/11/2020
	Principal Lifetime Hybrid 2020 CIT	5/11/2020
	Principal Lifetime Hybrid 2025 CIT	5/11/2020
	Principal Lifetime Hybrid 2030 CIT	5/11/2020
	Principal Lifetime Hybrid 2035 CIT	5/11/2020
	Principal Lifetime Hybrid 2040 CIT	5/11/2020

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	Principal Lifetime Hybrid 2045 CIT	5/11/2020
	Principal Lifetime Hybrid 2050 CIT	5/11/2020
	Principal Lifetime Hybrid 2055 CIT	5/11/2020
	Principal Lifetime Hybrid 2060 CIT	5/11/2020
	Principal Lifetime Hybrid 2065 CIT	5/11/2020
	Principal LifeTime Hybrid Inc CIT	5/11/2020
RBC Global Asset Management		
	RBC Global Horizon Equity	6/16/2020
	RBC QUBE AC World Low Vol Equity	6/16/2020
	RBC QUBE Global Low Vol Equity	6/16/2020
	RBC QUBE US Low Vol Equity	6/16/2020
Rockefeller & Co.		
	Non-U.S. ESG Fossil Fuel Free	6/25/2020
Sandhill Investment Management		
	Sandhill Concentrated Equity Alpha	6/4/2020
Silvercrest Asset Mgmt. Group LLC		
	International Small Cap Value	5/27/2020
Sit Investment Associates, Inc.		
	International Dividend Growth Equity	6/25/2020
Southeastern Asset Management		
	Asia Pacific Mandate	5/27/2020
	Longleaf Partners Asia Pacific UCITS	5/27/2020
	Longleaf Partners Global UCITS Fund	5/27/2020
Sumitomo Mitsui DS Asset Mgmt Co Ltd		
	DS_Japan Eq. High Conviction Value	4/8/2020
Touchstone Investments		
	Touchstone International Equity Fund	6/11/2020
	Touchstone Large Cap Focused Fund	6/11/2020
	Touchstone Small Company Fund	6/11/2020
UBS Asset Management		
	Climate Aware World Equity Strategy	6/3/2020
	Emerging Asia Equity	5/28/2020
	FTSE Developed Index Strategy	6/3/2020
	Global EQ Opportunity Unconstrained	5/28/2020
	Global Equity Concentrated Alpha	5/28/2020
	Global Income Equity	5/28/2020
	Morningstar Lifetime Growth TDS 10	6/11/2020
	Morningstar Lifetime Growth TDS 15	6/11/2020
	Morningstar Lifetime Growth TDS 20	6/11/2020
	Morningstar Lifetime Growth TDS 25	6/11/2020

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	Morningstar Lifetime Growth TDS 30	6/11/2020
	Morningstar Lifetime Growth TDS 35	6/11/2020
	Morningstar Lifetime Growth TDS 40	6/11/2020
	Morningstar Lifetime Growth TDS 45	6/11/2020
	Morningstar Lifetime Growth TDS 50	6/11/2020
	Morningstar Lifetime Growth TDS 55	6/11/2020
	Morningstar Lifetime Growth TDS 60	6/11/2020
	Morningstar Lifetime Growth TDS Inc.	6/11/2020
	Morningstar Lifetime Moderate TDS 15	6/11/2020
	Morningstar Lifetime Moderate TDS 20	6/11/2020
	Morningstar Lifetime Moderate TDS 30	6/11/2020
	Morningstar Lifetime Moderate TDS 40	6/11/2020
	Morningstar Lifetime Moderate TDS 50	6/11/2020
	Morningstar Lifetime Moderate TDS 60	6/11/2020
	MSCI Emerging Markets Index Strategy	6/3/2020
	MSCI World ex USA Min Vol Index	6/3/2020
	MSCI World Min Vol Index Strategy	6/3/2020
Ulland Investment Advisors, Inc.		
	Strategic Equity	5/4/2020
Ullico Investment Advisors, Inc.		
	Taxable Insurance Core Composite	6/25/2020
Vitruvian Capital Management*		
	Small Cap Equity	4/27/2020
Weaver C. Barksdale & Associates Inc		
	Weaver Income	5/19/2020
Wilshire Associates Incorporated		
	Wilshire ESG - AggGrowth	5/27/2020
	Wilshire ESG - Consv	5/27/2020
	Wilshire ESG - Growth	5/27/2020
	Wilshire ESG - MdCnsv	5/27/2020
	Wilshire ESG - MdGrth	5/27/2020
	Wilshire ESG - Moderate	5/27/2020
Xponance, Inc.		
	Xponance EAFE Strategy	5/4/2020
Zazove Associates, LLC		
	Zazove Hedged Convertible Fund, L.P.	6/25/2020