

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	109
Total New Managers	12
New Products from Existing Managers	89

Manager Name	Product Name	Date Added
1919 Investment Counsel		
	1919 Multi Cap Core	6/1/2021
Advisory Research, Inc.		
	Partners Fund	3/31/2021
	Small Cap Core	3/31/2021
	US Large Cap Growth	3/31/2021
Argus Investors' Counsel, Inc.		
	Argus Innovators	5/11/2021
Ariel Investments, LLC		
	Ariel Global Concentrated	5/3/2021
	Ariel Small Cap Value Concentrated	5/3/2021
BlackRock		
	BlackRock Mid-Cap Growth	5/25/2021
	MAS - MF/ETF TD - Conservative	5/11/2021
	MAS - MF/ETF TD - Growth	5/11/2021
	MAS - MF/ETF TD - Moderate	5/11/2021
BMO Global Asset Management		
	BMO Core Fixed Income	6/18/2021
	BMO Multi Sector Fixed Income	6/18/2021
Brown Advisory		
	Brown Advisory Tax-Exempt Sustainabl	5/21/2021
Capital Group		
	Global Equity - Expanded SMA	6/9/2021
Charles Schwab Trust Bank		
	Indexed Retirement Trust Fund 2065	6/11/2021
	Schwab Managed Ret Trust 2065, VI	6/11/2021
CIBC Asset Management		
	Active Currency Overlay 6% VAO	4/22/2021
ClearBridge Investments, LLC.		
	ClearBridge SMID Cap Growth	4/22/2021

As of June, 2021

Manager Name	Product Name	Date Added
Cohen & Steers Capital Mgmt., Inc.		
	Cohen & Steers LowDuration Preferred	6/15/2021
	Cohen & Steers Midstream Energy&MLP	6/15/2021
	Cohen & Steers MLP and Energy Opp	6/15/2021
Confluence Investment Management		
	Income-Taxable	5/20/2021
CXC Investments LLC*		
	CXC 1 LP	4/8/2021
DDJ Capital Management, LLC		
	DDJ Upper Tier HY Strategy	4/8/2021
	DDJ US Blended High Yield Composite	4/8/2021
Dodge & Cox		
	Dodge & Cox Core Credit Fixed Income	5/11/2021
	Dodge & Cox Intermediate Stable Val	5/11/2021
	Dodge & Cox Investment Grade Core FI	5/11/2021
Electron Capital Partners LLC*		
	Electron Global Fund, LP	6/14/2021
FolioBeyond LLC*		
	Dynamic Volatility Strategy	4/23/2021
Forsyth Capital LLC*		
	U.S. Small Cap Value	5/10/2021
Frontaura Capital LLC*		
	Frontaura Global Frontier Fund LLC	5/18/2021
Garcia Hamilton & Associates, L.P.		
	Fixed Income - Municipal	4/14/2021
GW&K Investment Management, LLC		
	Small/Mid Cap Growth Strategy	4/30/2021
Hancock Whitney Asset Management		
	HW Core Fixed Income	4/23/2021
Haven Global Partners, LLC		
	HGP International Developed	4/21/2021
HIP Investor Inc.		
	HIP Science-Based Targets: Climate A	6/25/2021
ICMA Retirement Corporation		
	Vantagepoint Milestone 2060	6/15/2021
Invesco		
	Emerging Markets Select Equity	4/13/2021
	Invnt Grade Floating Rate Bond SMA	5/13/2021
Ironvine Capital Partners, LLC		
	Ironvine Capital Core	5/17/2021

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J.P. Morgan Asset Management		
	J.P. Morgan US Technology Leaders-MA	6/24/2021
Jennison Associates LLC		
	Diversified Large Cap Growth Equity	6/24/2021
Katam Hill LLC*		
	Katam Hill Aggressive Growth Plus	5/17/2021
	Katam Hill Deep Growth	5/17/2021
	Katam Hill Deep Growth Plus	5/17/2021
Laurus Investment Counsel		
	Laurus Global Small Cap	4/8/2021
	Laurus International Equity	4/8/2021
Liberty One Investment Management		
	Opportunity	5/10/2021
Longfellow Investment Mgmt. Co.		
	Emerging Markets Equity Income	4/5/2021
	LIM Bulwark Credit Opportunities	5/10/2021
	LIM Diversified SPAC	5/11/2021
	LIM Long Duration Fixed Income	5/11/2021
	LIM TIPS	5/11/2021
	U.S. Quality Growth	5/11/2021
LTG Capital LLC*		
	Aqueduct	4/1/2021
Martin Investment Management, LLC		
	Martin Global Investing	5/27/2021
Matrix Asset Advisors, Inc.		
	Large Cap Opportunistic Value	4/27/2021
MFG Asset Management		
	MFG Global Sustainable Strategy	6/15/2021
Mondrian Investment Partners Limited		
	Concentrated Emerging Markets Equity	6/11/2021
	Global Equity ESG	6/28/2021
Montrusco Bolton Investments, Inc.		
	Montrusco Bolton Large Cap	5/17/2021
	Montrusco Bolton Large Cap Growth	5/13/2021
Newton Investment Management		
	BNYM Newton Global Equity Income SMA	4/9/2021
Nikko Asset Management Co., Ltd		
	Japan Active Value Equity Strategy	6/15/2021
Nomura Corp. Research and Asset Mgmt		
	NCRAM European High Yield	6/15/2021

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Oliver Luxxe Assets LLC		
	Focus Equity	4/14/2021
Polaris Wealth Advisory Group, LLC*		
	Polaris Focused Value	6/17/2021
Private Capital Management		
	Harmonic Investors LLC Explorer Fund	6/9/2021
Red Cedar Investment Management*		
	Dividend Growth Premium Income	3/31/2021
	Red Cedar Core Fixed Income	3/31/2021
	Red Cedar Core Plus Fixed Income	3/31/2021
	Red Cedar Dividend Growth	3/31/2021
	Red Cedar Short Term Bond	3/31/2021
	Red Cedar Strategic Income	3/31/2021
Royce & Assocs LP dba Royce Inv Ptrs		
	Global Small Cap Premier Quality	6/15/2021
Schroders		
	QEP Global ESG	6/15/2021
Spouting Rock Asset Management, LLC.		
	Global Small Cap	6/2/2021
	Highwood Capital Partners, LP	6/2/2021
	KGA Long Term Growth Strategy	6/2/2021
	KGA Sustainable Growth Strategy	6/2/2021
	Longmark	6/2/2021
	Manager Select - Absolute Return	6/2/2021
	Manager Select - Alternative Income	6/2/2021
Stance Capital*		
	Stance Collab Global ESG Equity	4/28/2021
	Stance Equity	4/28/2021
Stewart Asset Management LLC*		
	Concentrated US Equity Growth SMA	5/11/2021
System Two Advisors		
	Tara Emerging Asia Liquid Fund Cls A	6/17/2021
	Tara India Opportunities Portfolio	6/17/2021
T. Rowe Price		
	US Municipal 1-10 Year Ladder SMA	4/8/2021
	US Municipal 1-5 Year Ladder SMA	4/8/2021
Tactical Fund Advisors*		
	Tactical Growth Allocation Fund	4/28/2021
Thompson, Siegel & Walmsley LLC		
	TSW Large Cap Value	5/3/2021

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Thrivent Asset Management, LLC		
	Thrivent Small Cap Growth Fund	4/22/2021
TOBAM		
	Anti-Benchmark ACWI Strategy	6/15/2021
Wasatch Global Investors		
	Emerging India	6/15/2021
	Wasatch Global Select	6/17/2021
	Wasatch Global Select - Developed	6/15/2021
	Wasatch Global Small Cap	6/15/2021
	Wasatch Global Small Cap - Developed	6/15/2021
	Wasatch Global Value	6/15/2021
	Wasatch Greater China	6/11/2021
	Wasatch International Micro Cap	6/15/2021
	Wasatch International Select	6/15/2021
	Wasatch Micro Cap Value	6/15/2021
Weaver C. Barksdale & Associates Inc		
	Weaver Core Plus	4/16/2021
Western Asset Management Company		
	US Core Constrained	4/21/2021
Wilshire Associates Incorporated		
	Active Equity Income Portfolio	6/24/2021