



NEWS RELEASE

Virtus Investment Partners Adds Systematic and Multi-Asset Portfolio Management Capabilities

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HARTFORD, Conn., July 27, 2022 /PRNewswire/ -- **Virtus Investment Partners, Inc.** (NASDAQ: VRTS), which operates a multi-manager asset management business, has expanded its investment capabilities to include systematic quantitative investing and multi-asset allocation with the addition of two experienced portfolio management teams within Virtus Investment Advisers.

Virtus Systematic uses a state-of-the-art technology platform that is powered by artificial intelligence and natural language processing. The team's process incorporates a proprietary investment-return forecasting model that combines behavioral factors with intrinsic and valuation factors. Kunal Ghosh, chief investment officer and senior managing director, leads the team, working with three other experienced investment professionals, Lu Yu, managing director and lead portfolio manager, Jie Wei, director and senior portfolio manager, and Yang Zhang, assistant director and data scientist.

Virtus Multi-Asset assesses changing market, macroeconomic, and other factors to dynamically allocate across asset classes while incorporating environmental, social and governance factors into their investment process. The team consists of three experienced investment professionals, Paul Pietranico, CFA, chief investment officer and senior managing director, Heather Bergman, Ph.D., managing director and senior portfolio manager, and Michael Rothstein, director and portfolio manager.

"The Systematic and Multi-Asset teams further expand our investment capabilities, allowing us to continue to deliver individual and comprehensive investment solutions for our clients," said George R. Aylward, president and chief executive officer of Virtus. "The Systematic team's use of a quantitative, AI-based process to generate alpha, and the Multi-Asset team's specialization in asset allocation strategies that provide differentiated investment solutions, have proven to be distinguishing factors for their clients. We look forward to making these investment strategies available for institutional and individual investors and broadening their strategies into other asset classes and investment vehicles."

Virtus Systematic manages U.S. and non-US investment strategies across the market cap spectrum for institutional and retail clients. These strategies are available to clients in multiple investment vehicles including individually managed accounts as well as the Virtus Emerging Markets Opportunities Fund (I: AOTIX), Virtus Small-Cap Fund (I: AZBIX), and Virtus International Small-Cap Fund (I: ALOIX).

Pietranico and Bergman of Virtus Multi-Asset are portfolio managers of Virtus Global Allocation Fund (I: PALLX),

which they have managed since 2009 and 2017, respectively, with a previous subadviser, and the team provides asset allocation recommendations for the CollegeAccess 529 Plan. Ghosh is also a portfolio manager of the equity sleeve of the Global Allocation Fund.

About Virtus Investment Partners, Inc.

Virtus Investment Partners (NASDAQ: VRTS) is a distinctive partnership of boutique investment managers singularly committed to the long-term success of individual and institutional investors. We provide investment management products and services from our **affiliated managers**, each with a distinct investment style and autonomous investment process, as well as select subadvisers. Investment solutions are available across multiple disciplines and product types to meet a wide array of investor needs. Additional information about our firm, investment partners, and strategies is available at **virtus.com**.

Important Risk Considerations

Allocation: The risk that the portfolio's exposure to equities and fixed income securities, or to different asset classes, may vary from the intended allocation or may not be optimal for market conditions at a given time. **Issuer**

Risk: The portfolio will be affected by factors specific to the issuers of securities and other instruments in which the portfolio invests, including actual or perceived changes in the financial condition or business prospects of such

issuers. **Underlying Fund Risk:** The portfolio will be indirectly affected by factors, risks and performance

specific to any other portfolio in which it invests. **Debt Instruments:** Debt instruments are subject to greater levels of credit and liquidity risk, may be speculative and may decline in value due to changes in interest rates or an issuer's or counterparty's deterioration or default. **Interest Rate:** The values of debt instruments may rise or fall in response to changes in interest rates, and this risk may be enhanced for securities with longer maturities.

Derivatives: Derivatives may include, among other things, futures, options, forwards and swap agreements and may be used in order to hedge portfolio risks, create leverage, or attempt to increase returns. Investments in derivatives may result in increased volatility and the portfolio may incur a loss greater than its principal investment.

Market Volatility: Local, regional, or global events such as war, acts of terrorism, the spread of infectious illness or other public health issues, recessions, or other events could have a significant impact on the portfolio and its investments, including hampering the ability of the portfolio manager(s) to invest the portfolio's assets as intended.

Sustainable Investing: Because the portfolio focuses on investments in companies that the Manager believes exhibit strong environmental, social, and corporate governance records, the portfolio's universe of investments

may be smaller than that of other portfolios and broad equity benchmark indices. **Equity Securities:** The market price of equity securities may be adversely affected by financial market, industry, or issuer-specific events. Focus on a particular style or on small or medium-sized companies may enhance that risk. **Foreign & Emerging**

Markets: Investing in foreign securities, especially in emerging markets, subjects the portfolio to additional risks such as increased volatility, currency fluctuations, less liquidity, and political, regulatory, economic, and market risk.

Past performance is no guarantee of future results and current performance may be higher or lower than the performance shown. Investment return and principal value will fluctuate so your shares, when redeemed may be worth more or less than their original cost.

The Program Manager and Underwriter for the CollegeAccess 529 Plan is VP Distributors LLC, One Financial Plaza, Hartford, CT 06103, 1-800-243-4361. The Plan is issued by the South Dakota Higher Education Savings Trust.

Please consider a fund's investment objectives, risks, charges, and expenses carefully before investing. For this and other information about any Virtus Fund, contact your financial representative, call 800-243-4361, or visit **virtus.com** for a prospectus or summary prospectus. Read it carefully before investing.

Virtus Mutual Funds are distributed by **VP Distributors, LLC**, member FINRA and subsidiary of Virtus Investment Partners, Inc.

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