



NEWS RELEASE

Virtus Launches Virtus SGA New Leaders Growth Fund Managed by Sustainable Growth Advisers

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Fund expands SGA's offerings, leverages firm's global mid-cap growth capabilities

HARTFORD, Conn., Nov. 19, 2020 /PRNewswire/ -- **Virtus Investment Partners** (NASDAQ: VRTS), which operates a multi-boutique asset management business, and affiliated manager **Sustainable Growth Advisers** (SGA) have introduced the **Virtus SGA New Leaders Growth Fund** (A Shares: VNLAX, C Shares: VNLGX, I Shares: VNLIX, R6 Shares: VNLRX), which offers investors exposure to high-quality companies across the globe, with a distinct focus on mid-capitalization companies.

Robert L. Rohn, portfolio manager, analyst, and co-founder of SGA, said the fund invests in differentiated global businesses that he and portfolio managers Kishore Rao and Hrishikesh (HK) Gupta believe offer the potential for predictable, sustainable growth. The fund's objective of seeking long-term capital appreciation utilizes an investment approach that is also used by SGA's **Global Mid-Cap Growth** institutional separate account strategy.

SGA's investment process identifies companies that the firm believes have a high degree of predictability, strong profitability, and above-average earnings and cash flow growth. The portfolio managers expect the fund, which is benchmarked to the MSCI ACWI Mid Cap Index, will invest in a high-conviction, concentrated portfolio of approximately 25-35 high-quality, primarily mid-cap companies in the U.S. and developed and emerging markets.

"Our investment philosophy is centered on three essential elements: quality, growth, and valuation, with cash flow serving as the ultimate arbiter of value," Rohn said. "We use this philosophy to build a portfolio of quality companies that have predictable, resilient business models, including pricing power, recurring revenues, global opportunity, robust financials, and a strong management team. We believe this strategy can be particularly attractive when investing in mid-cap companies across market sectors worldwide."

Frank Waltman, executive vice president, product management for Virtus, said that the SGA New Leaders Growth Fund is the fourth Virtus Fund managed by SGA, joining the **Virtus SGA Emerging Markets Growth Fund** (I Shares: VIEGX), **Virtus SGA International Growth Fund** (I Shares: STITX), and the **Virtus SGA Global Growth Fund** (I Shares: SGAPX). SGA also manages portfolios for retail separate account and institutional clients. "We are pleased to expand the Virtus Funds offerings by leveraging SGA's consistent investment philosophy, which is based on fundamental research to identify equities of sustainable growth companies."

About Sustainable Growth Advisers

Founded in 2003, **Sustainable Growth Advisers** is an institutional investment management firm focused on providing high conviction U.S., global, international, and emerging markets portfolios. Its approach is designed to identify companies that they believe generate attractive absolute and relative returns over time by aligning client objectives with differentiated global businesses that could generate predictable, sustainable growth. SGA, which had \$19.8 billion in client assets under management as of September 30, 2020, operates as an independent affiliate of Virtus Investment Partners.

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. The company provides investment management products and services through its affiliated managers and select subadvisers, each with a distinct investment style, autonomous investment process, and individual brand. Virtus offers access to a variety of investment styles across multiple disciplines to meet a wide array of investor needs. In addition to SGA, Virtus' affiliates include **Ceredex Value Advisors**, **Duff & Phelps Investment Management**, **Kayne Anderson Rudnick Investment Management**, **Newfleet Asset Management**, **Seix Investment Advisors**, **Silvant Capital Management**, and **Virtus ETF Solutions**. Additional information is available at virtus.com.

Risk Considerations

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 fund to additional risks such as increased volatility, currency fluctuations, less liquidity, and political, regulatory, economic, and market risk. **Geographic Concentration:** A fund that focuses its investments in a particular geographic location will be sensitive to financial, economic, political, and other events negatively affecting that location.

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. **Prospectus:** For additional information on risks, please see the fund's prospectus.

Please consider the investment objectives, risks, charges, and expenses of the fund carefully before investing. The prospectus contains this and other information about the fund. For this and other information about any Virtus mutual fund, contact your financial representative, call 1-800-243-4361, or visit **Virtus.com**. Read the prospectus carefully before you invest or send money.

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