

# Virtus to Use Dorsey Wright's Relative Strength Capabilities for the Former AlphaSector Funds

## Funds renamed Virtus Trend Funds

HARTFORD, Conn., May 11, 2015 /PRNewswire/ -- [Virtus Investment Partners, Inc.](#) (NASDAQ: VRTS), which operates a multi-manager asset management business, today announced that it will employ the Relative Strength price momentum technical analysis of Dorsey, Wright & Associates, a leading provider of research to the investment management industry, in the management of five Virtus open-end mutual funds formerly known as the AlphaSector® funds.

The funds, which have been renamed the "Virtus Trend" funds, continue to employ rules-based strategies that seek to participate in rising markets and avoid large losses during major market declines by employing cash equivalents as market conditions dictate.

Dorsey Wright's Relative Strength price momentum rankings will be used to identify eligible investments across asset classes, sectors, sub-industry groups and securities. In addition, the funds' strategies will include certain rule changes that are intended to mitigate the impact of volatile markets, provide opportunities to participate more meaningfully in rising markets, and potentially move to more defensive positions during periods when analysis indicates higher-risk market conditions exist.

Warun Kumar, senior managing director, Virtus Investment Advisers, has been named co-portfolio manager of the funds and Euclid Advisors continues in its role as the funds' subadviser, responsible for portfolio implementation and trading. F-Squared Investments, an unaffiliated former subadviser, no longer provides services to the funds.

"Investment professionals have relied on Dorsey Wright's technical analysis for guidance in investing for more than 25 years. With their experience in price momentum strategies, Dorsey Wright is an ideal partner for Virtus and they share our commitment to producing quality outcomes for clients," said Frank Waltman, executive vice president, product management at Virtus. "We believe Relative Strength price momentum is an attractive method for identifying meaningful patterns in daily share price movements to manage risk and concentrate investments in those areas of the market with the higher probabilities of future outperformance."

"We are excited to begin a partnership with Virtus, bringing our longstanding Relative Strength expertise to the 'Virtus Trend' line-up of funds. Our collaboration with Virtus allows Dorsey Wright to further expand how it brings turn-key, quality solutions to the financial community," said Tom Dorsey, Founder of Dorsey, Wright & Associates.

Virtus also announced that it has reduced management fees for the Equity Trend, Global Equity Trend, and Multi-Asset Trend Funds.

The funds are: Virtus Sector Trend Fund (Class A: PWBAX; formerly AlphaSector Rotation); Virtus U.S. Equity Trend Fund (VAPAX; formerly Premium AlphaSector); Virtus Global Equity Trend Fund (VGPAX; formerly Global Premium AlphaSector); Virtus Multi-Asset Trend Fund (VAAVX, formerly Allocator Premium AlphaSector); and Virtus Dynamic Trend Fund (EMNAX; formerly Dynamic AlphaSector).

### About Dorsey, Wright & Associates

Dorsey, Wright & Associates is a registered investment advisory firm based in Richmond, Virginia. Since its founding in 1987, Dorsey Wright has been a leading advisor to Wall Street and investment managers worldwide. It provides three essential services for clients: comprehensive investment research and analysis,

professional money management for financial advisors and individuals, and licensing services to mutual funds and ETF providers. Dorsey Wright is a Nasdaq Company. For more information, visit [dorseywright.com](http://dorseywright.com).

### **About Virtus Investment Partners**

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. Virtus offers access to a variety of investment styles across multiple disciplines to meet a wide array of investor needs, and provides products and services through affiliated managers and select subadvisers, each with a distinct investment style, autonomous investment process and individual brand. Its affiliates include [Cliffwater Investments](#), [Duff & Phelps Investment Management](#), [ETF Issuer Solutions](#), [Euclid Advisors](#), [Kayne Anderson Rudnick Investment Management](#), [Kleinwort Benson Investors International](#), [Newfleet Asset Management](#), [Newfound Investments](#), [Rampart Investment Management](#) and [Zweig Advisers](#). Additional information can be found at [virtus.com](http://virtus.com).

### **Forward-Looking Information**

This press release contains statements that are, or may be considered to be, forward-looking statements. All statements that are not historical facts, including statements about our beliefs or expectations, are "forward-looking statements" within the meaning of The Private Securities Litigation Reform Act of 1995. These statements may be identified by such forward-looking terminology as "expect," "estimate," "plan," "intend," "believe," "anticipate," "may," "will," "should," "could," "continue," "project," or similar statements or variations of such terms. Our forward-looking statements are based on a series of expectations, assumptions and projections about our company, are not guarantees of future results or performance, and involve substantial risks and uncertainty as described in our most recent Annual Report on Form 10-K or in any of our filings with the Securities and Exchange Commission ("SEC"), which are available on our website at [www.virtus.com](http://www.virtus.com) under "Investor Relations." All of our forward-looking statements are as of the date of this release only. The company can give no assurance that such expectations or forward-looking statements will prove to be correct. Actual results may differ materially. You are urged to carefully consider all such factors.

**Fund Risks:** Allocation: The fund's exposure to different asset classes may not be optimal for market conditions at a given time. Asset allocation does not guarantee a profit or protect against a loss in declining markets. Equity Securities: The market price of equity securities may be adversely affected by financial market, industry, or issuer-specific events

**Investors should carefully consider the investment objectives, risks, charges and expenses of any Virtus Mutual Fund before investing. The prospectus and summary prospectus contain this and other information about the fund. Please contact your financial representative, call 1-800-243-4361, or visit [www.virtus.com](http://www.virtus.com) to obtain a current prospectus and/or summary prospectus. You should read the prospectus and/or summary prospectus carefully before you invest or send money.**

Mutual funds distributed by **VP Distributors, LLC**, member [FINRA](#) and subsidiary of Virtus investment Partners, Inc.

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