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Parametric Announces Lower Global ADR Portfolio Minimums

As an industry-leading provider of customized, tax-managed separate account solutions, Parametric is committed to providing our clients a broad range of innovative, benchmark-based equity portfolio strategies. Continuing in that pursuit, the firm is excited to announce an advanced capability that allows us to significantly lower the minimum investment size for a number of Global ADR portfolios. Portfolios managed to many global indices will now be available at minimums of \$250,000. This move will enable tremendous flexibility for many of our advisors who have adopted a core/satellite portfolio structure and view the core equity allocation from a global perspective.

Parametric has been managing global and international portfolios since the mid 90's. Largely due to the high costs associated with trading foreign securities in local markets, global portfolios have demanded sizeable minimums in the past – in many cases as high as \$10mm. However, enhancements to Parametric's proprietary portfolio management system, ADR mapping and new Barra Global Equity Risk Model now make lower minimums possible.

Some examples of the global benchmarks to which we manage:

- MSCI World
- FTSE RAFI Developed 1000
- KLD Global Sustainability
- Dow Jones Islamic Developed Market

Benefits of Parametric Management:

- Broad exposure to global markets in a single account
- Active tax management
- Portfolios are risk monitored versus the index
- Client-directed portfolio customization

Parametric will continue to innovate investment approaches that address advisors' demand for greater flexibility, increased choices and more efficient separate account solutions. In the coming months, the firm will be announcing additional capabilities in delivering portfolios that can be managed relative to custom blended global benchmarks. To learn more about Parametric's unique approach to managing global portfolios, please contact your regional representative or email us at parametricportfolio@paraport.com.