BNY | INVESTMENTS

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June 30, 2025

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[1]Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation (BNY). MIC is composed of two divisions; BNY Investments Mellon (Mellon), which specializes in index management, and BNY Investments Dreyfus (Dreyfus), which specializes in cash management and short duration strategies. Securities are offered through BNY Mellon Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC.

For further information, please contact a BNY representative or visit Our Perspectives at: https://www.bny.com/investments/us/en/institutional/perspectives/all-perspectives.html



OUR INVESTMENT MANAGERS

Great minds don't think alike:
the power of independent thinking.

ARX INVESTIMENTOS

$7.8B

Brazilian equity; macro; corporate bonds and fixed income strategies.[1]

DREYFUS

$416.1B

Leading liquidity solutions provider with a comprehensive array of cash and short duration strategies.[2]

INSIGHT INVESTMENT

$853.2B

Leader in global fixed income and risk management solutions.[3]

MELLON

$513.4B

A global leader in index management dedicated to precision and client partnership.[2]

NEWTON

$104.3B

Active equities, income, absolute return, multi-asset, thematic and sustainable strategies.[4]

WALTER SCOTT

$78.3B

Global equity investment management.[5]

AUM in USD as of June 30, 2025.

[1] ARX is the brand used to describe the Brazilian investment capabilities of BNY Mellon ARX Investimentos Ltda. ARX is an affiliate of The Bank of New York Mellon Corporation. [2]Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation (BNY). MIC is composed of two divisions; BNY Investments Mellon (Mellon), which specializes in index management, and BNY Investments Dreyfus (Dreyfus), which specializes in cash management and short duration strategies. Securities are offered through BNY Mellon Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC. Where applicable, AUM includes discretionary and non-discretionary assets and assets managed by investment personnel acting in their capacity as officers of affiliated entities; and where cited, Responsible Investing assets include assets managed in custom strategies and assets managed in accordance with client-directed guidelines. [3]Insight provides investment advisory services in North America through two investment management entities. Insight North America LLC (INA) provides investment management services to U.S. based clients. INA is registered as an investment adviser with the Securities and Exchange Commission (SEC) and as a Commodity Trading Advisor and Commodity Pool Operator with the National Futures Association (NFA) and Commodity Futures Trading Commission (CFTC). Insight Investment International Limited (IIIL) provides investment advisory services to Canadian-based clients. IIIL is registered as a Portfolio Manager and Commodity Trading Manager in various provinces in Canada. Both INA and IIIL utilize the brand, Insight Investment. INA and IIIL are part of "Insight" or "Insight Investment," the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited (IIMG) and Insight Investment Management (Europe) Limited (IIMEL). [4] BNY Investments Newton is the name for a group of affiliated companies that provide investment management services under the trading name of 'Newton' or 'Newton Investment Management'. Investment management services are provided in the United Kingdom by Newton Investment Management Ltd (NIM), in the United States by Newton Investment Management North America LLC (NIMNA), and in Japan by Newton Investment Management Japan Limited (NIMJ). All firms are indirect subsidiaries of The Bank of New York Mellon Corporation (BNY) [5]Walter Scott & Partners Limited (Walter Scott) is an investment management firm authorized and regulated in the United Kingdom by the Financial Conduct Authority in the conduct of investment business. Walter Scott is a subsidiary of The Bank of New York Mellon Corporation.

INVESTMENT STRATEGIES

▲ ACTIVE
▼ INDEX/ENHANCED
■ FUND-OF-FUNDS

The investment strategies identified in this table may not be available in all products or services provided by the specialist manager, and may not be available to all investors. Please consult with your BNY representative or a financial professional for additional information on how a particular strategy is managed. Please note: Not all strategies may be available to all investors in all markets.
[1]Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation (BNY). MIC is composed of two divisions; BNY Investments Mellon (Mellon), which specializes in index management, and BNY Investments Dreyfus (Dreyfus), which specializes in cash management and short duration strategies. Securities are offered through BNY Mellon Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC. Note: Mellon's investment strategies are purely index. [2]BNY Investments Newton is the name for a group of affiliated companies that provide investment management services under the trading name of 'Newton' or 'Newton Investment Management'. Investment management services are provided in the United Kingdom by Newton Investment Management Ltd (NIM), in the United States by Newton Investment Management North America LLC (NIMNA), and in Japan by Newton Investment Management Japan Limited (NIMJ). All firms are indirect subsidiaries of The Bank of New York Mellon Corporation (BNY)
[3]Mellon provides day-to-day investment advisory services. [4]Effective 1/1/25, BNY Wealth appointed MIC as Sub-adviser for its separately managed tax managed equity accounts.

	ARX	DREYFUS[1]	INSIGHT	MELLON[1]	NEWTON[2]	WALTER SCOTT
Equity						
Asia Pacific (Ex. Japan)				▼	▲	
Brazil	▲					
Developed (Ex. U.S.)				▼	▲	▲
Emerging Markets				▼	▲	▲
European				▼	▲	▲
Global				▼	▲	▲
Pacific				▼		
Japan				▼		
Real Estate Securities (REITs)	▲			▼		
Smart Beta Equity Strategies					▲	
U.K.				▼	▲	
U.S.				▼	▲	▲
Fixed Income						
Asia Pacific				▼		
Cash Management (U.S., Euro, Sterling, Other)	▲	▲	▲			
Convertible Bonds			▲			
Core				▼	▲	
Core Plus			▲			
Corporate Credit	▲		▲	▼		
Direct Lending			▲			
Emerging Markets	▲		▲	▼		
European			▲	▼		
Global			▲	▼	▲	
Government/Sovereign Fixed Income		▲	▲	▼	▲	
High Yield			▲		▲	
Inflation-Linked			▲	▼		
Long Duration			▲	▼		
Mortgages			▲	▼		
Municipal Bonds			▲			
Senior Secured Loans			▲▼			
Short/Intermediate Duration		▲	▲	▼		
Structured Credit/ABS			▲	▼		
Tax-Sensitive			▲			
U.K.			▲	▼	▲	
U.S.		▲	▲	▼		
Alternatives						
Absolute Return	▲		▲		▲	
Global Macro					▲	
Hedge Funds	▲				▲	
Infrastructure					▲	
Market Neutral/Long-Short	▲				▲	
Master Limited Partnerships						
Multi-Strategy	▲				▲	
Natural Resources/Commodities					▲	
Portable Alpha					▲	
Private Equity						
Private Real Estate						
Solutions						
Balanced/Multi-Asset Class	▲		▲▼	▼	▲▼	
Direct Indexing[3]				▼		
Dynamic Hedge Strategies (CPPI)			▲		▲	
FX/Currency Management			▲			
Liability-Driven Investing			▲▼			
Life Cycle/Target Date					▲▼	
Overlay/Futures/Swaps			▲	▼	▲	
Risk Parity					▲▼	
Tax Managed Equity[4]				▼		
Thematic				▼	▲	

Important information

All investments involve risk including loss of principal. Certain investments involve greater or unique risks that should be considered along with the objectives, fees, and expenses before investing.

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Unless otherwise noted, all references to assets under management (which are approximate) are as of June 30, 2025.

Personnel of certain of our BNY affiliates may act as: (i) registered representatives of BNY Mellon Securities Corporation (in its capacity as a registered broker-dealer) to offer securities and certain bank-maintained collective investment funds, (ii) officers of the Bank of New York Mellon (a New York chartered bank) to offer bank-maintained collective investment funds, and (iii) Associated Persons of BNY Mellon Securities Corporation (in its capacity as a registered investment adviser) to offer separately managed accounts managed by BNY Investments firms.

Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation (BNY). MIC is composed of two divisions; BNY Investments Mellon (Mellon), which specializes in index management, and BNY Investments Dreyfus (Dreyfus), which specializes in cash management and short duration strategies. Securities are offered through BNY Mellon Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC. Where applicable, AUM includes discretionary and non-discretionary assets and assets managed by investment personnel acting in their capacity as officers of affiliated entities; and where cited, Responsible Investing assets include assets managed in custom strategies and assets managed in accordance with client-directed guidelines. • Insight Investment advisory services in North America are provided through two different investment advisers registered with the Securities and Exchange Commission (SEC), using the brand Insight Investment: Insight North America LLC (INA) and Insight Investment International Limited (IIIL). The North American investment advisers are associated with other global investment managers that also (individually and collectively) use the corporate brand Insight Investment and may be referred to as "Insight" or "Insight Investment." • BNY Investments Newton is the name for a group of affiliated companies that provide investment management services under the trading name of 'Newton' or 'Newton Investment Management'. Investment management services are provided in the United Kingdom by Newton Investment Management Ltd (NIM), in the United States by Newton Investment Management North America LLC (NIMNA), and in Japan by Newton Investment Management Japan Limited (NIMJ). All firms are indirect subsidiaries of The Bank of New York Mellon Corporation (BNY). Newton is incorporated in the United Kingdom and is authorized and regulated by the Financial Conduct Authority in the conduct of investment business. Newton is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser. Newton is a subsidiary of BNY. • BNY Mellon Advisors, Inc. personnel may offer products and services in their capacity as employees and officers of The Bank of New York Mellon (the "Bank"), including investment strategies that are developed by affiliated BNY investment advisory firms and managed by officers of such firms acting in their capacities as dual officers of the Bank. BNY Mellon Advisors, Inc. is an investment adviser registered as such with the U.S. Securities and Exchange Commission (SEC) pursuant to the Investment Advisers Act of 1940, as amended. BNY Mellon Advisors, Inc. is a subsidiary of The Bank of New York Mellon Corporation. • BNY Mellon ARX (ARX) is the brand used to describe the Brazilian investment capabilities of BNY Mellon ARX Investimentos Ltda. ARX is an affiliate of The Bank of New York Mellon Corporation.

Insight Investment International Limited, Newton Investment Management Limited and Walter Scott & Partners Limited are authorized and regulated by the Financial Conduct Authority. The registered address for Insight Investment International Limited and Newton is BNY Mellon Centre, 160 Queen Victoria Street, London, EC4V 4LA, England. The registered address for Walter Scott is One Charlotte Square, Edinburgh, EH2 4DR, Scotland.

Investment advisory services in North America are provided through two different investment advisers registered with the Securities and Exchange Commission (SEC), using the brand Insight Investment: Insight North America LLC (INA) and Insight Investment International Limited (IIIL). INA and IIIL are part of 'Insight' or 'Insight Investment', the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited (IIMG), Insight Investment International Limited (IIIL), and Insight Investment Management (Europe) Limited (IIMEL). INA is a registered investment adviser under the Investment Advisers Act of 1940 and regulated by the US Securities and Exchange Commission.

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Newton's assets under management are as of the most recent quarter end, unless noted otherwise. Newton's assets under management include assets collectively managed by NIM, NIMNA and NIMJ. In addition, AUM for Newton includes assets of bank-maintained collective investment funds for which Newton has been appointed sub-advisor, where Newton personnel act as dual officers of affiliated companies and assets of wrap fee account(s) for which Newton provides sub-advisory services to the primary manager of the wrap program.

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