

New Products and Managers

Informa Investment Solutions understands the importance of complete and up-to-date information. New Products and Managers are identified in bold inside of PSN Enterprise, but this quarterly reference guide makes it even easier to see the latest additions. This listing identifies all new products, from both new and existing managers, and the date they entered PSN. Newly added managers are identified with an asterisk (*).

Summary

Total New Products	196
Total New Managers	14
New Products from Existing Managers	160

Manager Name	Product Name	Date Added
3D Asset Management, Inc.		
	3D Targeted Fixed Income (2022)	7/12/2017
	3D Targeted Fixed Income (2023)	7/12/2017
Advisor Partners, LLC		
	Managed ETF/MF Portfolio - Moderate	8/11/2017
	Managed ETF/MF Portfolio-Aggressive	8/11/2017
Aegon USA Investment Management LLC		
	Aegon Long Government/Credit	8/11/2017
AllianceBernstein L.P.		
	AB Emerging Markets Strategic Core	7/28/2017
Altair Management Partners		
	Altair Tactical Fixed Income, SMA	7/13/2017
AltraVue Capital, LLC		
	AltraVue Fund I, LP	7/19/2017
AMG Capital Management*		
	ACM All Cap	7/25/2017
	ACM Global Dividend	7/27/2017
	ACM Small Cap & Mid Cap	7/27/2017
Ancora Advisors		
	High Dividend Equity	9/19/2017
Applied Finance Group Intl, LLC		
	AFG High Dividend	8/29/2017
Aristotle Credit Partners, LLC		
	Interm. Investment Grade Corporate	9/19/2017
Atlanta Capital Management Co., LLC		
	High Quality (AAA) Ultra-Short Sec	9/14/2017
Avalon Advisors, LLC		
	Avalon Equity Income (non MLPs)	8/9/2017
Bahl & Gaynor, Inc.		

Manager Name	Product Name	Date Added
	Global Dividend Growth	8/8/2017
Belvedere Advisors LLC		
	Belvedere Emerging Markets Opport.	9/12/2017
	Belvedere Global Equities Strategy	9/12/2017
	Belvedere Momentum Strategy	9/12/2017
	Belvedere Quantum Strategy	9/12/2017
Canterbury Investment Mgmt., LLC		
	Portfolio Thermostat (MF)	7/19/2017
Chandler Asset Management, Inc.		
	Intermediate Bond SMA	9/6/2017
	Intermediate Corporate Bond Ladder	9/6/2017
	Short Term Corporate Bond Ladder	9/6/2017
Cincinnati Asset Management, Inc.		
	Short Duration - IG Corp Bonds Only	8/29/2017
Clarkston Capital Partners, LLC		
	Mid-Cap Strategy	8/17/2017
Clinton Investment Management, LLC		
	MuniBond Intermediate Duration	7/13/2017
Commerce Bank		
	Commerce Fixed Income Intermediate	9/1/2017
	Large Cap Value	8/29/2017
Cooke & Bieler, L.P.		
	SMID Cap Value Equity	9/22/2017
Curran Investment Management, LLC.		
	Curran Smid Cap Equity	9/19/2017
Dana Investment Advisors, Inc.		
	Dana ETF Focused Balanced Allocation	9/29/2017
	Dana ETF Focused Limited Volatility	9/13/2017
	Dana ETF Focused Municipal Bond	9/13/2017
	Dana ETF Focused Preferred Income	9/13/2017
	Dana ETF Focused Strategic Income	9/29/2017
	Dana ETF Focused Total Return	9/13/2017
Davenport & Company LLC		
	Small Cap Focus Fund	8/21/2017
Dolan McEntery Capital Mgmt., LLC		
	Dolan McEntery Short Duration	7/12/2017
Eaton Vance Management		

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	U.S. Corp. Ladder 3-7yr BBB-	8/29/2017
Empiric Institutional*		
	EI US Small Cap Core	7/26/2017
	EI US Small Cap Growth	7/26/2017
EmStone Advisers		
	Enhanced LM2	9/26/2017
	Enhanced LM3	9/26/2017
First Eagle Investment Mgmt., LLC		
	First Eagle International Value Fund	9/26/2017
Franklin Templeton Investments		
	Franklin All Country World ex-U.S. E	8/9/2017
Fred Alger Management, Inc.		
	Weatherbie Specialized Growth SMA	9/6/2017
Frost Investment Advisors, LLC		
	Frost Core Plus Composite	9/29/2017
Granahan Investment Management, Inc.		
	Small Cap Select Opportunities	7/7/2017
Guardian Capital LP		
	Guardian Emerging Markets Equity	8/29/2017
Harvest Volatility Management, LLC		
	Long/Short Replacement	9/26/2017
	Purchase Power Protection	9/26/2017
HAV Capital LLC*		
	HAV Global Equity	8/29/2017
	HAV International Equity	8/29/2017
Hemispheres Investment Management*		
	Core Plus	8/25/2017
	Global Broad Equity	8/29/2017
	Global Concentrated Equity	8/25/2017
Herndon Capital Management, LLC		
	Small Cap US Value Equity	7/26/2017
HIP Investor Inc.		
	HIP Global Dividends ESG	8/15/2017
ICMA Retirement Corporation		
	Model Portfolio Conservative Growth	9/6/2017
	Model Portfolio GlobalEq Growth	9/6/2017
	Model Portfolio Long-Term Growth	9/6/2017

Manager Name	Product Name	Date Added
	Model Portfolio Traditional Growth	9/6/2017
	VT Vantagepoint International	9/6/2017
	VT Vantagepoint Milestone 2010	9/6/2017
	VT Vantagepoint Milestone 2015	9/6/2017
	VT Vantagepoint Milestone 2020	9/6/2017
	VT Vantagepoint Milestone 2025	9/6/2017
	VT Vantagepoint Milestone 2030	9/6/2017
	VT Vantagepoint Milestone 2035	9/6/2017
	VT Vantagepoint Milestone 2040	9/6/2017
	VT Vantagepoint Milestone 2045	9/6/2017
	VT Vantagepoint Milestone 2050	9/6/2017
	VT Vantagepoint Milestone 2055	9/6/2017
	VT Vantagepoint Milestone Retirement	9/6/2017
Invesco		
	US Corporate Bond SMA/WRAP	9/13/2017
Ironvine Capital Partners, LLC*		
	Ironvine Capital Concentrated	9/1/2017
Jacobs Levy Equity Management		
	130-30 Core Equity (R3000)-Sep Acct	7/12/2017
	130-30 Core Equity (R3000)Commingled	7/12/2017
	Large Cap Dynamic (R1000 Dynamic)	8/10/2017
	Mid Cap (S&P 400)	7/12/2017
	Mid Dynamic (Russell Midcap Dyn)	7/12/2017
	Small Cap Def. (Russell 2500 Def)	7/12/2017
Jensen Investment Management, Inc.		
	Jensen Quality Value Composite	8/11/2017
L&S Advisors, Inc.		
	Core	7/19/2017
	Core-Select	7/19/2017
	Diversified Equity	7/19/2017
	Equity Growth	7/19/2017
	High Yield Fixed Income	7/19/2017
	Income Equity	7/28/2017
	Short Duration High Yield	7/19/2017
	Short Duration Investment Grade	7/19/2017
	Tactical Equity ETF	7/19/2017
	Tax-Free Fixed Income	7/19/2017

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	Taxable Fixed Income	7/19/2017
Lazard Asset Management LLC		
	Custom 1	9/8/2017
	Custom 2	9/8/2017
	Custom 3	9/8/2017
	Custom 4	9/8/2017
	Global Equity Franchise	7/20/2017
	MA Custom 1	9/8/2017
	MA Custom 2	9/8/2017
	MA Custom 3	9/8/2017
	MA Custom 4	9/8/2017
LMCG Investments, LLC		
	Mid Cap Core (Optimized)	9/22/2017
Logan Capital Management, Inc.		
	Logan High Quality Balanced	7/19/2017
Longfellow Investment Mgmt. Co.		
	Arbitrage	9/27/2017
Loomis, Sayles & Company, L.P.		
	Corporate Disciplined Alpha	8/17/2017
	Credit Asset	9/8/2017
	Emerging Markets Short Duration Cre	9/8/2017
	Global Growth	8/17/2017
	Global High Yield	8/17/2017
	Global World Bond	8/17/2017
	Long Corporate Disciplined Alpha	8/17/2017
	World Credit Asset	9/8/2017
Madison Investment Advisors, LLC		
	Madison Tax Advantaged Income	7/13/2017
Martingale Asset Management, L.P.		
	LargeCap Defensive	9/14/2017
	LargeCap Dynamic	9/14/2017
	SmallCap Core	9/14/2017
Maryland Capital Management, LLC		
	MCM Apto Global Tactical Alloc. ETF	9/21/2017
Mayo Investment Advisers, LLC*		
	Mayo Tax-Exempt Account Strategy	8/4/2017
	Mayo Taxable Account Strategy	8/4/2017

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Model Capital Management LLC*		
	American Revival - Balanced	9/13/2017
	American Revival - Conservative	9/13/2017
	American Revival - Growth	9/13/2017
	American Revival - Growth Plus	9/13/2017
	American Revival - Income	9/13/2017
	Tactical 2xStocks-Bonds	9/13/2017
	Tactical Income	9/13/2017
	Tactical Limit-Loss	9/13/2017
MRM Group		
	Tax-Advantaged Income	8/9/2017
National Investment Services, Inc.		
	Dynamic Fixed Income - Intermediate	9/22/2017
Neuberger Berman LLC		
	Fraenkel Group - Conservative Growth	7/31/2017
	MLG Group	8/24/2017
	Multi-Asset Real Return	7/5/2017
Nicholas Investment Partners, L.P.		
	Healthcare Opportunities	7/26/2017
Nordea Investment Management		
	Alpha 15 Strategy	7/19/2017
	Flexible Fixed Income Strategy	7/19/2017
	Multi-Asset Strategy	7/19/2017
	Stable Emerging Markets Equity Strat	7/19/2017
	Stable Return Diversified Grwth Str	7/5/2017
NorthStar Asset Management, Inc.*		
	NorthStar All-Cap Global Equity	8/4/2017
O'Shaughnessy Asset Management, LLC		
	U.S. REIT	9/20/2017
Osmosis Investment Management*		
	Osmosis MoRE Europe Strategy	9/28/2017
	Osmosis MoRE International ADR	9/28/2017
	Osmosis MoRE Japan Strategy	9/28/2017
Osterweis Capital Management		
	Emerging Opportunity (MF - OSTGX)	9/22/2017
	Total Return	9/22/2017
	Total Return (MF - OSTRX)	9/12/2017

Manager Name	Product Name	Date Added
Pacific Income Advisers, Inc.		
	Core Plus	8/1/2017
PreserverPartners, LLC		
	Preserver Alternative Opportunities	7/26/2017
PVG Asset Management Corporation		
	U.S. Large Cap Value	7/17/2017
QBI Financial, LLC*		
	QBI Global Large Cap Low Volatility	7/24/2017
	QBI Global Low Volatility	7/24/2017
	QBI Global Mid Cap Low Volatility	7/24/2017
	QBI International Large Cap Low Vol	7/24/2017
	QBI US Large Cap Low Volatility	7/24/2017
	QBI US Small Cap Low Volatility	7/24/2017
Redwood Investment, LLC		
	ACWlexUS Equity	9/8/2017
	Asia Pacific Equity	9/8/2017
	Global Emerging Markets Equity	9/8/2017
	International Developed Mkts. Equity	9/8/2017
Regan Investments, Inc.		
	Focused Equity Portfolio	8/15/2017
Robinson Capital Management, LLC		
	Enhanced Cash Public Funds	7/11/2017
Ryan Labs Asset Management Inc.		
	Long Treasury	8/30/2017
Setanta Asset Management LTD*		
	Setanta EAFE Equity	7/19/2017
	Setanta Global Equity	7/12/2017
Shelton Capital Management		
	Shelton Diversified ETF Growth	8/1/2017
Snow Capital Management, LP		
	Dividend Plus	8/23/2017
SouthernSun Asset Management		
	Global Opportunities Strategy	8/17/2017
Spire Wealth Management, LLC*		
	Corbett Road Opportunity Strategy	8/16/2017
Stephens Investment Management Group		
	Stephens SMID Select Growth	7/12/2017

Manager Name	Product Name	Date Added
Sterling Partners Equity Advisors		
	Sterling Quality Income & Value	9/1/2017
Stone Harbor Investment Partners LP		
	Core Bond	9/6/2017
ThirtyNorth Investments, LLC*		
	Women Impact Strategy	9/28/2017
TrimTabs Asset Management, LLC*		
	All Cap Free Cash Flow Strategy	8/4/2017
Union Labor Life		
	Separate Account J CF	7/7/2017
	Separate Account R CF	7/7/2017
	Separate Account W1 CF	7/7/2017
Wilbanks, Smith & Thomas Asset Manag		
	Diversified Income Risk-Managed	8/24/2017
	Global Allocation Risk-Managed	8/24/2017
	International Select Risk-Managed	8/24/2017
	Listed Alternatives	8/24/2017
Wilbanks, Smith & Thomas Asset Mgmt		
	Momentum Opportunities Risk-Managed	9/12/2017
	Sector Select	9/12/2017
	US Macro Select	9/12/2017
WrapManager Inc.		
	Flex Conservative Growth	7/12/2017
	Flex Conservative Growth and Income	7/12/2017
	Flex Conservative Income	7/12/2017
	Flex Long Term Growth	7/12/2017
	Flex Long Term Growth and Income	7/12/2017
	Flex Long Term Income	7/12/2017
	Flex Moderate Growth	7/12/2017
	Flex Moderate Growth and Income	7/12/2017
	Flex Moderate Income	7/12/2017