

# BROADRIDGE TOP 40 Money Managers - 4 Quarters Returns

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Product/Style Category: **U.S Diversified/Multi-cap Equity**  
 Performance Measurement Period: **4 Quarters Ending 12/31/2024**  
 Mean Return for the Category and Period: **17.7982%**  
 Universe Size: **273**

Lists the top rates of return reported by managers for this category and time period. All results are reported net of fees and inclusive of cash.

Rank	Firm Name/Portfolio	4 Quarters ROR	Assets in Composite
1	Morgan Stanley Investment Management Inc. - Morgan Stanley Insight Fund;I	46.71%	\$484.7M
2	Morgan Stanley Investment Management Inc. - Morgan Stanley Inst Growth Portfolio;I	46.63%	\$1567.2M
3	Morgan Stanley Investment Management Inc. - Insight	46.11%	\$1535.0M
4	Lord, Abnett & Co. LLC - Lord Abnett Growth Leaders Fund;F	44.96%	\$361.1M
5	American Century Investments - American Century Focused Dynamic Growth Fd;G	44.54%	\$510.6M
6	Transamerica Asset Management, Inc. - Transamerica Capital Growth;I	44.34%	\$738.3M
7	Chase Investment Counsel Corporation - Chase Growth Fund;Inst	38.93%	\$46.9M
8	Transamerica Asset Management, Inc. - Transamerica Large Growth;I3	37.42%	\$263.7M
9	Morgan Stanley Investment Management Inc. - Morgan Stanley Institutional Advantage Port;I	36.16%	\$105.2M
10	Virtus Investment Partners - Virtus Zevenbergen Innovative Growth Stock Fund;I	35.81%	\$377.6M
11	Zevenbergen Capital Investments LLC - Zevenbergen Growth Equity	35.52%	\$1408.0M
12	Logan Capital Management, Inc. - Logan Growth	34.66%	\$25.9M
13	Invesco - Invesco Summit Fund;P	34.33%	\$3023.9M
<b>14</b>	<b>Ulland Investment Advisors, LLC - Intelligent Blend</b>	<b>34.19%</b>	<b>\$25.4M</b>
15	Bridgeway Capital Management, LLC. - Aggressive Investors 1	34.00%	\$261.5M
16	Jennison Associates LLC - Jennison Financial Services Equity	33.55%	\$167.4M
17	Westfield Capital Management Company, L.P. - Westfield All Cap Growth Equity	33.46%	\$1566.1M
18	T. Rowe Price Associates, Inc. - T Rowe Price Tax-Efficient Equity Fund;I	32.52%	\$835.9M
19	Macquarie Asset Management - Science and Technology	31.88%	\$6439.0M
20	Federated Hermes, Inc - Federated Hermes MDT All Cap Core Institutional	31.40%	\$1481.0M
21	Artisan Partners Limited Partnership - Antero Peak	31.39%	\$1978.7M
22	Federated Hermes, Inc - Federated Hermes MDT All Cap Core Fund;Inst	31.07%	\$979.9M
23	Capstone Asset Management Company - Steward Large Cap Growth Fund;Institutional	30.88%	\$177.7M
24	Allspring Global Investments - All Cap Growth Equity	29.83%	\$4073.4M
25	Morgan Stanley Investment Management Inc. - Morgan Stanley Institutional US Core Portfolio;I	28.61%	\$260.2M
26	Fisher Investments - FIIG US Sustainable Equity Impact ESG	28.24%	\$589.2M
27	Fisher Investments - FIIG US Shariah Equity	27.91%	\$41.2M
28	AQR Capital Management, LLC - AQR Large Cap Momentum Style Fund;I	27.81%	\$311.9M
29	Martin Capital Advisors, LLP - MCA Flexible Growth Portfolios	27.31%	\$112.4M
30	Invesco - Invesco Main Street All Cap Fund;R	27.05%	\$76.7M
31	Victory Capital Management Inc. - Victory Diversified Stock Fund;I	26.56%	\$27.6M
32	Fisher Investments - FIIG US Total Return ESG	26.40%	\$1629.3M
33	Fisher Investments - FIIG US All Cap Equity Focused ESG	26.38%	\$369.5M
34	American Century Investments - American Century Heritage Fund;G	26.13%	\$972.6M
35	TD Global Investment Solutions – TD Epoch - TD Epoch U.S. Choice	25.94%	\$10.1M
35	Victory Capital Management Inc. - Victory Munder Multi-Cap Fund;Y	25.94%	\$44.7M
37	Putnam Investment Management, L.L.C. - Putnam Core Equity Fund;R	25.84%	\$15.1M

38	T. Rowe Price Associates, Inc. - T Rowe Price All-Cap Opportunities Fund;I	25.37%	\$6513.8M
38	Allspring Global Investments - Growth SMA	25.37%	\$61.8M
38	BlackRock, Inc. - BlackRock Diversified Equity Fund;Inst	25.37%	\$1077.5M

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- *Performance must be calculated "net" of all fees and brokerage commissions. This means after all fees and commissions have been deducted;*
- *Performance must be calculated inclusive of all cash reserves;*
- *Performance results must be calculated in U.S. dollars, that is, from the perspective of a U.S.-based investor;*
- *Performance results must be calculated on an asset base which is at least \$10 million in size for "traditional" U.S. asset classes (equity, fixed income, balanced accounts) or at least \$1 million in the case of international and "alternative" U.S. asset classes;*
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