



RMB Asset Management's SMID Cap Strategy Named Asset Manager of the Year by Envestnet & *Investment Advisor* Magazine

CHICAGO - June 24, 2021 - RMB Capital ("RMB"), an independent investment advisory firm with approximately \$9.8 billion in assets under management¹ (estimated as of March 31, 2021), announced that RMB Asset Management's SMID Cap strategy, under the leadership of co-portfolio managers Chris Faber and Jeffrey Madden, has been named as 2021 Asset Managers of the Year in the small/SMID/mid-cap category by Envestnet and *Investment Advisor* magazine.

RMB was recognized for its management of the RMB SMID Cap Core Managed Account and RMB SMID Cap Fund. According to *Investment Advisor*, the strategy took home one of two awards in the category out of 200 entries for its strong performance "largely due to its ability to adapt quickly to the volatile market conditions caused by the pandemic."

"We are honored that our small/SMID-cap portfolio management team has received this prestigious industry award from Envestnet and *Investment Advisor* for their stewardship of one of our key strategies," said RMB founding partner, CEO, and co-chief investment officer Dick Burridge. "This award is well-deserved validation for the hard work of Chris, Jeff, and their team, and evidence of how our long-term, fundamental approach to stock-picking is durable, even during times of extreme market duress."

For 17 years, Envestnet, in partnership with *Investment Advisor* magazine, has given recognition to high-conviction portfolio managers that embody investment management best practices. The goal is to provide industry intelligence that empowers advisors to identify top-performing managers whose strategies can potentially bring their clients closer to achieving overall financial wellness.

RMB's SMID Cap Core strategy has been managed by Faber and Madden since its inception in 2004, and focuses on allocating capital to companies with strong management teams and knowledge building cultures that drive adaptability. Available as a mutual fund, separately managed account, and

¹ Total assets under management ("AUM") presented here differs from regulatory assets under management ("RAUM") reported on RMB Capital's Form ADV. AUM reflects net assets under management for private funds and mutual funds managed by RMB Capital, while RAUM reflects gross assets under management. AUM also includes RMB West's assets under advisement, which are not included in RMB Capital's RAUM. AUM estimated as of 3/31/21.

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through model delivery, the strategy employs a proprietary “dual diversification” strategy, which diversifies holdings across sectors and economic life cycles, helps remove potential style biases, and allows for excess return to come from stock selection. The resulting portfolio has an intentional quality bias.

The winners in each category were selected from hundreds of portfolio managers using the systematic, proprietary, and multi-factor methodology developed by Envestnet's Portfolio Management Consultants group, Envestnet | PMC. The extensive qualitative and quantitative criteria taken into consideration include firm profile, performance, tax efficiency, investment process and style, composite, and customer service. To be eligible for an Asset Manager and Strategist of the Year Award, managers must have at least \$200 million in assets under management and three years of experience. Managers' strategies must also be broadly available on the Envestnet platform, and open to new investors.

ABOUT RMB ASSET MANAGEMENT

RMB Asset Management specializes in long-term, concentrated, active investing strategies. From long-only strategies to a select lineup of differentiated absolute return offerings, its products span the market-cap spectrum and the globe. Its team of experienced portfolio managers and analysts are united by an emphasis on fundamental research and a belief that quality portfolios outperform.

ABOUT RMB CAPITAL

RMB Capital is an independent investment advisory firm. Its businesses include wealth management, family office services, asset management, and retirement plan consulting. Headquartered in Chicago, RMB also has offices in Denver; Jackson Hole, Wyo.; Lake Forest, Ill.; Milwaukee; Minneapolis; New York; St. Joseph, Mich.; and Washington D.C. To learn more about RMB, visit rmbcapital.com.

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