

# Who We Are

## ABOUT US

From the very beginning of Wasatch in 1975, our approach has emphasized collaboration and intellectual curiosity—and an unrelenting focus on the pursuit of superior risk-adjusted returns for our clients. We bring unparalleled experience—and a global perspective—to micro-, small- and mid-cap investing.

## INDEPENDENT

We are 100% employee-owned and committed to staying that way. Off the beaten path and far from Wall Street, we've been known for decades for our original thinking.

## CLIENT FIRST

Success at Wasatch isn't measured by assets under management, but by our ability to serve our clients' needs and deliver excess returns. We have repeatedly demonstrated that commitment through our willingness to close successful investment strategies and thereby protect current clients.

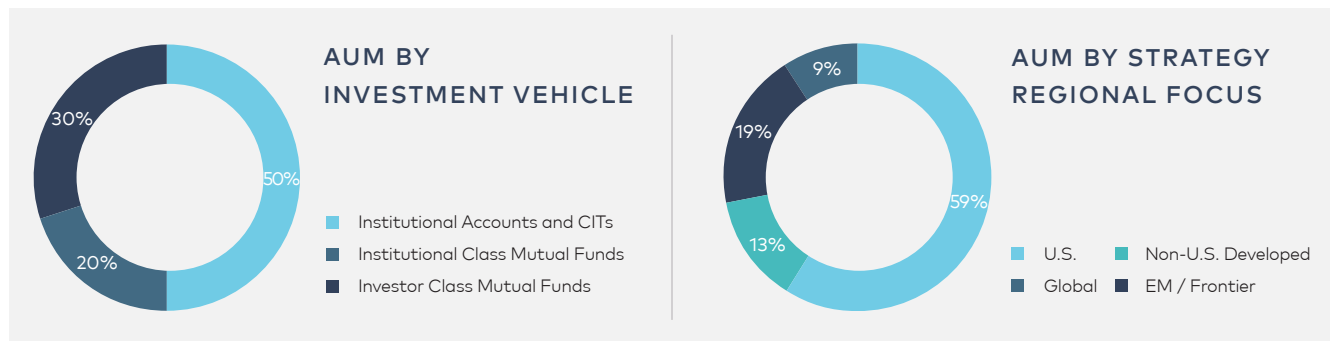


## DISCIPLINED GROWTH INVESTORS

We are 100% focused on active investment management. For more than four decades, we have applied our bottom-up investment approach to finding high-quality growth companies.

## SMALL-CAP SPECIALISTS

We are a comprehensive global equity manager with unparalleled coverage of small-cap companies. Our investment process requires that we roll up our sleeves, conducting intensive research to build a detailed understanding of companies and their prospects.



**\$34.4**  
billion in assets  
under management

**87**  
employees

**33**  
investment  
professionals

**22**  
years average  
PM experience

**14**  
years average  
PM tenure

## SMALL-CAP SPECIALISTS



## INVESTMENT STRATEGIES AND VEHICLES

| Region   | Strategy Name                     | Primary Benchmark               | Separate Account | CIT | Mutual Funds        |                |
|----------|-----------------------------------|---------------------------------|------------------|-----|---------------------|----------------|
|          |                                   |                                 |                  |     | Institutional Class | Investor Class |
| U.S.     | Micro Cap Growth - U.S.           | Russell Microcap®               | ✓                |     | WGICX               | WMICX          |
|          | Micro Cap Value                   | Russell Microcap                | ✓                |     | WGMVX               | WAMVX          |
|          | Small Cap Core Growth             | Russell 2000® Growth            | ✓                | ✓   | WIGRX               | WGROX          |
|          | Small Cap Growth                  | Russell 2000 Growth             | ✓                | ✓   | WIAEX               | WAAEX          |
|          | Small Cap Ultra Growth            | Russell 2000 Growth             | ✓                |     | WGMCX               | WAMCX          |
|          | Small Cap Value                   | Russell 2000 Value              | ✓                |     | WICVX               | WMCVX          |
| Non-U.S. | Emerging India                    | MSCI India IMI                  | ✓                |     | WIINX               | WAINX          |
|          | Emerging Markets Select           | MSCI Emerging Markets           | ✓                |     | WIESX               | WAESX          |
|          | Emerging Markets Small Cap        | MSCI Emerging Markets Small Cap | ✓                | ✓   | WIEMX               | WAEMX          |
|          | Frontier Emerging Small Countries | MSCI Frontier Emerging Markets  | ✓                |     | WIFMX               | WAFMX          |
|          | Global Select                     | MSCI ACWI                       | ✓                |     | WGGSX               | WAGSX          |
|          | Global Small Cap                  | MSCI ACWI Small Cap             | ✓                |     | WIGOX               | WAGOX          |
|          | Greater China                     | MSCI China                      | ✓                |     | WGGCX               | WAGCX          |
|          | International Micro Cap           | MSCI ACWI ex USA Small Cap      | ✓                |     | WIIOX               | WAIIOX         |
|          | International Select              | MSCI ACWI ex USA                | ✓                |     | WGISX               | WAIISX         |
|          | International Small Cap Growth    | MSCI ACWI ex USA Small Cap      | ✓                |     | WIIGX               | WAIIGX         |

Not a comprehensive list of Wasatch strategies.

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### RISKS

Wasatch Funds are subject to risk, including loss of principal. Investing in small- and micro-cap funds will be more volatile and loss of principal could be greater than investing in large cap or more diversified funds. Investing in foreign securities, especially in frontier and emerging markets, entails special risks such as unstable currencies, highly volatile securities markets and political and social instability, which are described in more detail in the prospectus. Investments in value stocks can perform differently from the market as a whole and from other types of stocks and can continue to be undervalued by the market for long periods. Listed Funds' primary investment objective is long-term growth of capital. You cannot invest in indexes.

**An investor should consider investment objectives, risks, charges and expenses carefully before investing. To obtain a prospectus, containing this and other information, visit [wasatchglobal.com](http://wasatchglobal.com) or call 800.551.1700. Please read the prospectus carefully before investing.**

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