



Wasatch Portfolio Manager Updates

Salt Lake City, Utah, January 8, 2024—Wasatch Global Investors announced today portfolio-manager changes that include updated roles for longtime investment professionals JB Taylor and Jim Larkins.

JB is the Lead Portfolio Manager of the Small Cap Growth, Core Growth and Global Opportunities Funds. Jim is the Lead Portfolio Manager of the Small Cap Value Fund.

Based on well-established succession plans, effective January 31, JB and Jim will step down from their Lead roles on these funds and related institutional strategies but will remain as Portfolio Managers. JB will also remain as the CEO and a board member of Wasatch Global Investors. The updated roles are reflected in the following table:

Wasatch Fund / Strategy	Current	Effective January 31	Wasatch Tenure
Small Cap Growth	JB Taylor, Lead Portfolio Manager Ryan Snow, Portfolio Manager Ken Korngiebel, Portfolio Manager	Ryan Snow, Lead Portfolio Manager Ken Korngiebel, Lead Portfolio Manager JB Taylor, Portfolio Manager	23 Years 8 Years 27 Years
Core Growth / Small Cap Core Growth	JB Taylor, Lead Portfolio Manager Paul Lambert, Portfolio Manager Mike Valentine, Portfolio Manager	Paul Lambert, Lead Portfolio Manager Mike Valentine, Lead Portfolio Manager JB Taylor, Portfolio Manager	23 Years 7 Years 27 Years
Global Opportunities / Global Small Cap	JB Taylor, Lead Portfolio Manager Ajay Krishnan, Lead Portfolio Manager Paul Lambert, Portfolio Manager Ken Applegate, Portfolio Manager	Ajay Krishnan, Lead Portfolio Manager Paul Lambert, Lead Portfolio Manager Ryan Snow, Portfolio Manager Ken Applegate, Portfolio Manager JB Taylor, Portfolio Manager	29 Years 23 Years 23 Years 9 Years 27 Years
Small Cap Value	Jim Larkins, Lead Portfolio Manager Austin Bone, Portfolio Manager	Austin Bone, Lead Portfolio Manager Jim Larkins, Portfolio Manager	7 Years 28 Years
Micro Cap Value	Brian Bythrow, Lead Portfolio Manager Thomas Bradley, Associate Portfolio Manager	Brian Bythrow, Lead Portfolio Manager Thomas Bradley, Portfolio Manager	20 Years 9 Years

“Wasatch has a long history of successful portfolio-manager transitions. We attribute this success to our team-oriented research approach and our thoughtful development of investment talent,” said JB. “Because of our collaborative approach, my role and Jim’s role won’t change dramatically from what they are today. Both Jim and I will remain involved with our teams to ensure a smooth transition of portfolio management in the coming years. I have tremendous confidence in our team and look forward to helping ensure our continued success.”

Jim added, “With most of our careers having been spent at Wasatch, JB and I have worked to help build a world-class research process. We’re confident in our team, and we believe shareholders and clients will see no difference in how their portfolios are managed.”

About Wasatch Global Investors

Wasatch Global Investors is a 100% employee-owned investment manager founded in 1975 and headquartered in Salt Lake City, Utah. Named after the nearby Wasatch Mountain Range, the firm brings unparalleled experience to U.S. and international micro-, small- and mid-cap investing with a culture that emphasizes collaboration, excellence and intellectual curiosity. Wasatch had \$26.7 billion in assets under management as of December 31, 2023. Wasatch Global Investors is registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940.

FIRM CONTACT: **Eric Bergeson**

p: (801) 533-0777 / eric@wasatchglobal.com

IMPORTANT RISK INFORMATION

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 or call (800) 551-1700. Please read it carefully before investing.

Mutual fund investing involves risks, and loss of principal is possible. Investing in small cap and micro cap funds will be more volatile, and loss of principal could be greater than investing in large cap or more diversified funds. Investments in value stocks can perform differently from other types of stocks and from the market as a whole and can continue to be undervalued by the market for long periods of time. Investing in foreign securities, especially in emerging markets, entails special risks such as currency fluctuations and political uncertainties, which are described in more detail in the prospectus. The primary investment objective of the Small Cap Growth, Core Growth, Global Opportunities, Small Cap Value and Micro Cap Value Funds is long-term growth of capital.

Wasatch Funds are distributed by ALPS Distributors, Inc. (ADI). Eric Bergeson is a registered representative of ADI. ADI is not affiliated with Wasatch Global Investors.

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