



Wasatch Core Growth Fund to Close to New Investors

Salt Lake City, Utah (March 25, 2024)—Wasatch Global Investors announced today that as of 4:00 p.m. EDT on April 30, 2024, the Wasatch Core Growth Fund and its related institutional strategy will undergo a “soft closure” to new investors. This means the Fund will cease accepting new purchases, with exceptions for new shareholders buying directly from Wasatch Funds, existing shareholders, established retirement plans, and clients purchasing through select intermediaries, consulting firms, and financial advisors.

“We made the strategic decision to reopen the Core Growth Fund in 2022 because market volatility had provided a unique opportunity for long-term investors,” said Eric Bergeson, President of Wasatch Global Investors. “At this time, we believe it’s important to limit assets coming into the Fund and strategy well before any potential impact on performance. Our commitment to prudent management in the firm’s small-cap offerings includes closely monitoring capacity. Our proactive approach ensures that we can continue managing the Fund and strategy in a manner we believe will deliver strong risk-adjusted returns for our clients.”

Wasatch Core Growth Fund to Soft Close Effective April 30, 2024		
Wasatch Fund	Share Classes	Portfolio Management
Core Growth	Investor – WGROX Institutional – WIGRX	Paul Lambert, Lead Portfolio Manager Mike Valentine, Lead Portfolio Manager JB Taylor, Portfolio Manager

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 \$26.9 billion in assets under management as of February 29, 2024. Wasatch Global Investors is registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940.

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Risks

Mutual fund investing involves risks and loss of principal is possible. Investing in small or 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 emerging markets, entails special risks such as currency fluctuations and political uncertainties, which are described in more detail in the prospectus. The investment objective of the Funds is long-term growth of capital.

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.

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