

Emerging Manager *Monthly*

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Zevenbergen, MayTech Top 2017; Aegis Ranks #1 In Q4 Performance Report

Zevenbergen Capital Investment's closed out 2017 with the highest performing strategy, riding the information technology sector to returns of more than 50% for the year in its domestic all-cap growth strategy, according to EMM's fourth quarter performance report.

The firm's ZTech Growth Equity strategy returned 52.5% for the calendar year, taking the top spot for the 1-year period by firm's with products over \$10 million in assets.

Global equity manager MayTech Global Investments followed closely behind, returning 50.32% for the year.

Emerging markets equity manager RVX Asset Management was the only other firm to finish 2017 with performance topping 50%, posting a 50.16% return for the year.

In the fourth quarter, Aegis Financial Corporation's domestic small-cap value equity portfolio closed out the year the strongest, returning 21.77%.

Overall, 944 products from 346 firms were included in the report, with large-cap core the most populated strategy at 101.

Managers were required to enter firm asset and product asset data for the period ending Dec. 31 as well as performance figures for the quarter to be included.

Please see the disclaimer in the full report for details on how the data was collected from the PSN Informa database.

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Wilshire Consulting Launches Diverse Asset Manager Initiative

Wilshire Consulting has announced a new inclusivity initiative to promote manager diversity and broaden its diverse-owned manager outreach.

The firm will now include at least one diverse-owned firm in every public securities manager search it conducts for advisory clients, "where products are available that fit the client mandate," according to the firm, which consults on nearly \$1 trillion in assets.

The firm will also now include the percentage of women- and minority-ownership by firms in its standard search books, the firm said.

Wilshire Managing Director Felicia Bennett said the firm will be hosting webinars and other outreach efforts moving forward in order to accommodate the broader base of managers and managers are able to reach anyone at the firm to assist in that endeavor, though she noted that Senior Associate Jerry Hsu is the primary contact. Hsu's email is jhsu@wilshire.com.

"We will be doing more in terms of publishing and inviting more broadly a universe of interested managers to participate," Bennett said.

The firm will also utilize the diversity initiative in the private markets space when applicable, she said, however the firm rarely conducts one-off searches in that space given the nature of the investments.

The firm has also renamed its Emerging Manager Asset Class Committee to the Diverse Owned Manager Asset Class Committee, which will continue to meet on a quarterly basis.

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**21 Firms Vie
Across
7 Categories**

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