Two Westwood Strategies Added to Envestnet's Model UMA Platform

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DALLAS, May 02, 2019 (GLOBE NEWSWIRE) -- Westwood Holdings Group, Inc. (WHG) announced today that it is now offering two strategies on the Envestnet Model UMA platform, which allows clients to build customized portfolio models and choose from a large range of investment products to fund each asset class. Westwood's SmallCap Value and LargeCap Select strategies are now available to investors through Envestnet ONE with an investment minimum of $100,000. This move supports Westwood's focus on retail distribution and expands availability of its time-tested solutions to intermediaries and financial advisors.

"We are pleased to join Envestnet's Model UMA platform as part of our ongoing broader effort to grow both our sales team and our service model, and meet investor demand, especially in the unified managed account space," noted Steve Paddon, Head of Distribution at Westwood Holdings Group.

Westwood SmallCap Value seeks to pursue superior returns while controlling overall portfolio risk. Leveraging a 15-year track record, this high-conviction portfolio is actively managed and relies on a bottom-up fundamental security selection process. The SmallCap Value strategy typically includes approximately 50-70 securities with attractively valued high-quality companies that have strong fundamentals. The strategy has achieved 3.1% annualized alpha since inception, net of fees versus the Russell 2000 Value, and has a percentile ranking in the top decile for total net return performance in the U.S. Small Cap Equity Universe.

Westwood LargeCap Select is a highly concentrated, "best ideas" portfolio that typically invests in 15-30 high-quality businesses with conservative balance sheets, strong free cash flow, the potential for attractive future returns and a market capitalization of $5 billion at the time of purchase. The strategy has achieved 3.7% annualized alpha since inception in January 2014 and is available on the Envestnet Model UMA Platform at a low fixed fee.

"We are very pleased to make these two well-performing strategies more easily available to advisors as they help clients achieve their goals," said Harvey Steele, Head of Intermediary Distribution at Westwood Holdings Group.

Westwood Holdings Group, Inc. provides investment management services to institutional investors, private wealth clients and financial intermediaries. The firm has $16.8 billion in assets under management, of which $2.7 billion are in values-based and socially responsible investment mandates as of March 31, 2019. Westwood offers a range of investment strategies including U.S. equities, Multi-Asset, Emerging Markets equities, Global Convertible securities and Master Limited Partnerships (MLPs) portfolios. Access to these strategies is available through separate accounts, the Westwood Funds® family of mutual funds, UCITS funds and other pooled vehicles. Westwood benefits from significant, broad-based employee ownership and trades on the New York Stock Exchange under the symbol "WHG." Based in Dallas, Westwood also maintains offices in Toronto, Boston and Houston.

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