Established Managed Investment Solutions Team Joins Westwood Holdings Group

October 31, 2023

Chicago-Based Team Adds New Capabilities to Broaden Westwood's Offering With Bespoke Investment Solutions

DALLAS, Oct. 31, 2023 (GLOBE NEWSWIRE) -- Westwood Holdings Group, an investment management boutique and wealth management firm focused on value and multi-asset strategies, is proud to announce the addition of a cutting-edge Managed Investment Solutions team, bolstering the firm's ability to provide customized solutions to institutional and wealth investors.

Westwood's new Managed Investment Solutions team, based in Chicago, will focus on tailoring investment solutions to a diverse array of individual institutional risk/reward tolerances and investment approaches. Greg Behar, Drew Miyawaki and Shaun Murphy boast an average of 25 years of institutional investment experience and come to Westwood with a proven track record of successfully providing diverse institutional clients with bespoke investment solutions.

"Our new Managed Investment Solutions capability is a powerful addition to our suite of capabilities, offering prospective clients the flexibility to access an extensive range of market and thematic exposures," said Brian O. Casey, Chief Executive Officer. "This new addition is designed to be adaptable, transparent, and, most importantly, customized to address the ever-evolving needs of a diverse client base."

The team's unique approach is focused on active design partnered with passive implementation and will provide differentiated value for Westwood clients. Prospective clients for this service include public plans, sovereign wealth funds, corporate pension plans, defined contribution plans, endowments, foundations, consultant groups and wealth investors.

"Central to our Managed Investment Solutions team's strategy is an ongoing commitment to actively listen and achieve a profound understanding of our clients' portfolios and their evolving objectives," said Greg Behar. "We start by comprehensively assessing a prospective client's current exposures and overarching objectives. This approach ensures that the desired outcomes are in harmony with the broader context of the client's entire portfolio. By clarifying the detailed trade-offs associated with various methodologies, we aim to fine-tune a solution to meet the client's unique goals and objectives."

"This expansion brings to Westwood an ability to diversify our product offerings, broaden our client base and enhance our revenue streams," said Fabian Gomez, Westwood Holdings Group President. "We believe the current market conditions are highly conducive to the introduction of our Managed Investment Solutions capability and our new team members are pivotal to realizing our ambitions in this regard."

"This expansion represents a notable entry into a substantial market segment, where there is a strong demand for a solutions business that seamlessly complements our existing investment capabilities," added Brian Casey. "I believe this investment signals to the market, our shareholders and employees that we are committed to pursuing thoughtful strategic initiatives to improve our business and return to a growth trajectory."

Meet the New Westwood Managed Investment Solutions Team

Greg Behar is a Senior Investment Leader with over 20 years of institutional investment experience in building global teams, existing and new business lines, and new global investment strategies. Greg most recently served as LGIMA's head of index investment strategy and was responsible for providing investment thought leadership to investors and developing comprehensive investment solutions and insights across the spectrum of index strategies. Prior to joining LGIMA, Greg was a senior vice president and head of global equity investment strategy at Northern Trust Asset Management. Prior to joining Northern Trust, Greg was a portfolio specialist for the active quantitative equity strategies at Deutsche Asset Management. Greg holds a BA in Economics from Binghamton University and serves on various index advisory panels.

Drew Miyawaki has over 20 years of U.S. and international experience on both the buy and sell sides. Drew has held head of equity trading roles at numerous firms, most recently at Chicago-based LGIMA, with a focus on improving client outcomes across a diverse universe of global indices. Drew relocated to the U.S. from London to globalize the trading function and help build LGIM's U.S.-based index business. Prior to working at LGIM in London, Drew held sell side positions at Knight Capital, Liquidnet and Jefferies, with a focus on portfolio, algorithmic and electronic trading and transaction cost analysis. He holds a BSc in Behavioral Science from Drew University.

Shaun Murphy, CFA, has extensive experience and understanding of investment philosophy, process and products serving institutional, high net worth and retail clients at both large organizations and investment boutiques. Shaun joined LGIMA in 2013, where he most recently was the head of U.S. index funds and was responsible for establishing and growing a multi-asset index solutions business. Prior to working at LGIMA, Shaun held various positions at Northern Trust, including being responsible for the management of portfolio management groups in the U.S., EMEA and Asia Pacific. He started his career at State Street Global Advisors in London as an investment manager. Shaun is a CFA charterholder. He holds a BA (Honors) in Business Studies from the University of Sunderland and spent two years attending the University of Wisconsin-Milwaukee.

ABOUT WESTWOOD HOLDINGS GROUP, INC.

Westwood Holdings Group, Inc. is a focused investment management boutique and wealth management firm.

Westwood offers a broad array of investment solutions to institutional investors, private wealth clients and financial intermediaries. The firm specializes in two distinct investment capabilities: U.S. Value Equity and Multi-Asset, which includes Asset Allocation, Tactical Absolute Return, Energy and Real Assets. Westwood's strategies are made available through separate accounts, the Westwood Funds ® family of mutual 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 Houston and San Francisco.
For more information on Westwood, please visit westwoodgroup.com.

Media Contact:

Tyler Bradford
Hewes Communications
212.207.9454
tyler@hewescomm.com

Source: Westwood Holdings Group Inc