

A QUICK LOOK AT

# Avantis Investors

## Strong investor adoption

Avantis Investors was created in 2019 to deliver value-added solutions at low fees. Today, thousands have placed trust in Avantis across a range of equity, fixed income, and real asset strategies.

Since launching in 2019

**\$76B**

Assets Under Management\*

**3,500+**

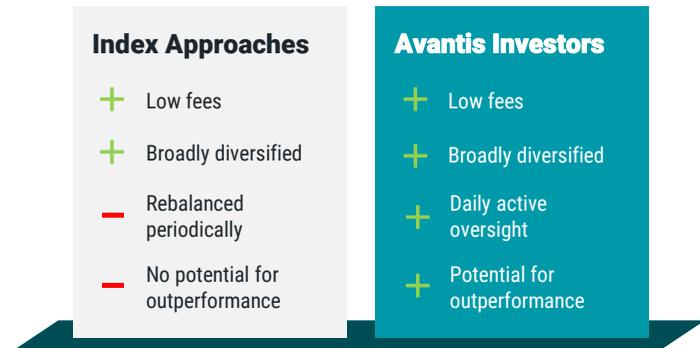
Advisor and Institutional Clients

**32**

Strategies for Building Value-Added Allocations

## Solutions designed for better outcomes

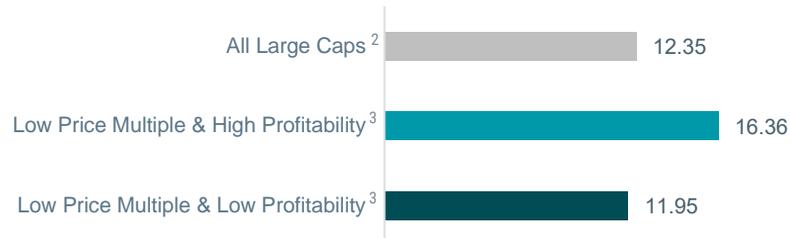
Avantis solutions are designed to combine many of the same benefits as index investing with the potential for added value by considering expected returns\*\* each day. It's the parts of passive that make sense with the parts of active that can make a difference.



## Modernized value investing

Value investing is not about finding cheap companies, as many traditional value approaches do. It's about getting the most you can for the price you pay, which means targeting high quality companies with strong profitability at good prices. That's what matters for finding higher expected returns. That's modern value investing.

Annualized Returns (%), US Large Cap Stocks, 1973-2024<sup>1</sup>



## Built on a solid foundation with a greater purpose

Avantis Investors is backed by American Century Investments (ACI)—a \$200+ billion\* asset manager that has served investors for more than 60 years. Under a unique ownership structure, over 40% of profits are paid to ACI's owner, the Stowers Institute of Medical Research. They are dedicated to uncovering the causes, treatments and cures of life-threatening diseases.

**\$2B+**

Distributed Since 2000 to Fund Innovative Medical Research



Past performance is no guarantee of future results.

1. Source: Avantis Investors and Sunil Wahal, CRSP/Compustat, U.S. Securities, 1973-2024.
2. Large Caps: A company with a market capitalization value of more than \$10 billion.
3. Low Price Multiple: A company with low price compared to its level of earnings.

\*Avantis and ACI data as of 6/30/2025.

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**\*\*Expected Returns:** Valuation theory shows that the expected return of a stock is a function of its current price, its book equity (assets minus liabilities) and expected future profits, and that the expected return of a bond is a function of its current yield and its expected capital appreciation (depreciation). We use information in current market prices and company financials to identify differences in expected returns among securities, seeking to overweight securities with higher expected returns based on this current market information. Actual returns may be different than expected returns, and there is no guarantee that the strategy will be successful.

*This material has been prepared for educational purposes only. It is not intended to provide, and should not be relied upon for, investment, accounting, legal or tax advice.*

*Investment return and principal value of security investments will fluctuate. The value at the time of redemption may be more or less than the original cost. Past performance is no guarantee of future results.*

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