

# SOLUTION OVERVIEW

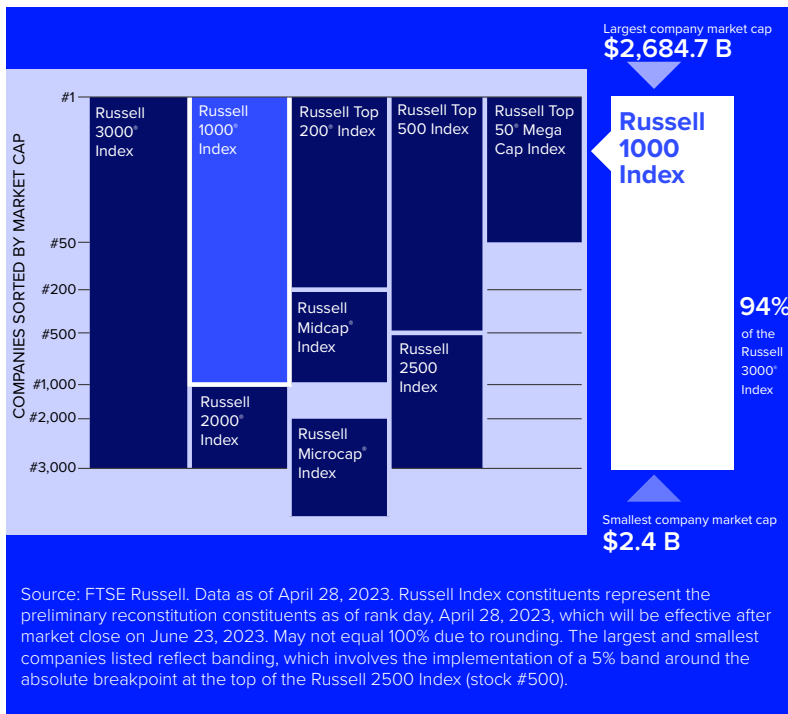
## Russell 1000 Index



### A complete view of the large cap segment of the US equity market.

The Russell 1000 Index is a subset of the Russell 3000 Index that includes approximately 1,000 of the largest companies in the US equity universe. Constructed using a transparent, rules-based methodology, the Russell 1000 Index is designed to provide unbiased representation of the large cap segment of the US equity market.

### Russell 1000 Index and Russell US Indexes



- Index launched January 1, 1984
- Performance from December 31, 1978 available

### A trusted partner

Approximately \$12.1 trillion is benchmarked to the Russell US Indexes\*, which provide comprehensive representation of the US equity market and its size and style segments.

#### Relevant

The Russell US Indexes are modular and flexible in their design, enabling customizable asset allocation structure.

#### Representative

Comprehensive coverage of the large cap segment of the US equity market, suitable as a benchmark for actively managed investments or as the foundation of index-linked products such as mutual funds and ETFs.

#### Reliable

Maintained using transparent, objective rules including annual reconstitution, quarterly IPO additions, and daily corporate action adjustments to ensure the index remains representative.

\* Source: Data as of December 31, 2021 as reported on April 1, 2022 by eVestment for institutional assets, Morningstar for retail mutual funds, insurance products, and ETFs, and additional passive assets directly collected by FTSE Russell. AUM data includes blended benchmarks and excludes futures and options. Passive assets directly collected by FTSE Russell have been removed from third party sources to prevent double counting. No assurances are given by FTSE Russell as to the accuracy of the data.

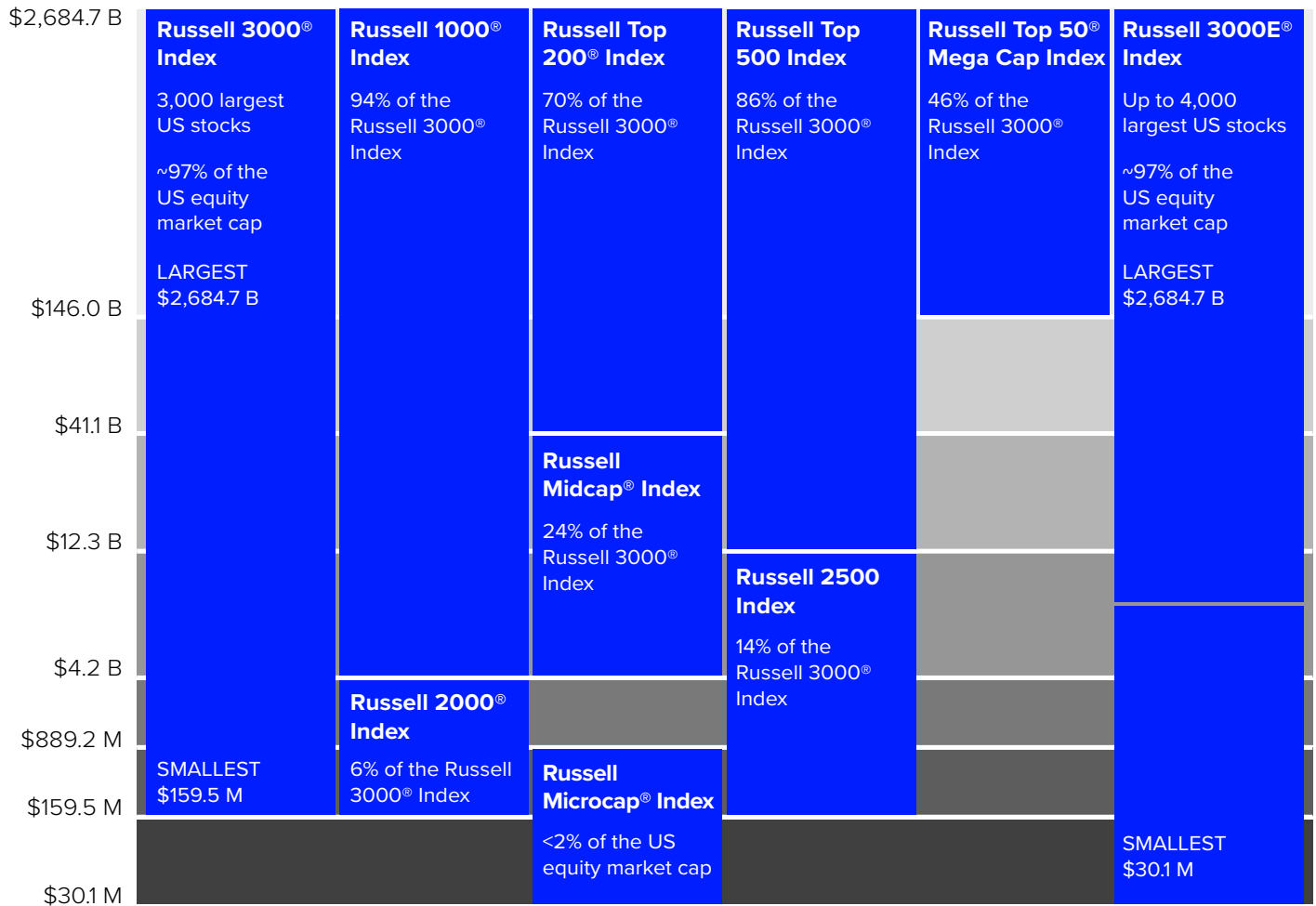


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## Russell US Indexes as of reconstitution

The Russell US Indexes are completely recalibrated each year in June during reconstitution.

This rules-based approach to capturing the US market, which defines the breaks between market capitalization segments and determines where companies fall along the growth/value spectrum, is one of the most anticipated US market events each year.



Source: FTSE Russell. Data as of April 28, 2023. Russell Index constituents represent the preliminary reconstitution constituents as of rank day, April 28, 2023, which will be effective after market close on June 23, 2023. May not equal 100% due to rounding.

The market capitalization breakpoints for the Russell Indexes are based on new additions as of 2023 reconstitution. The market capitalization ranges used above are absolute breakpoints for new members and do not include capitalization banding. Capitalization banding involves the implementation of a ±2.5% band around certain breakpoints. For further information, please refer to the Russell US Indexes construction and methodology document or contact FTSE Russell Client Service.

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