
Embracing Market Volatility

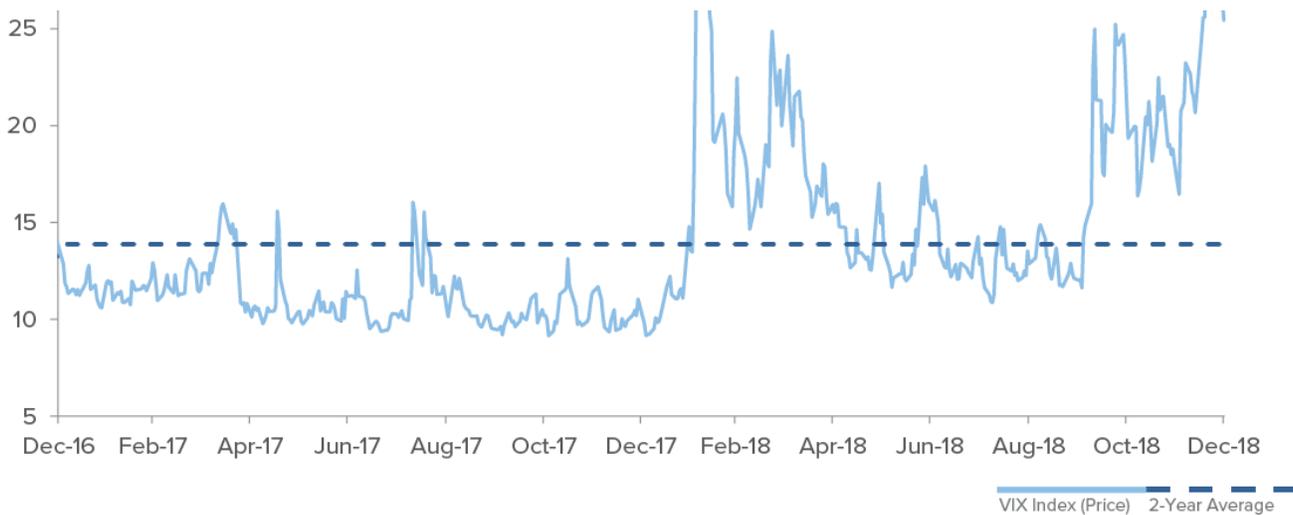
westwoodgroup.com/insight/embracing-market-volatility/



Equity market volatility is back. Learn how Westwood’s bottom-up, multi-asset approach may improve client outcomes in the current market environment.

Planning for downturns will be essential as market volatility normalizes.

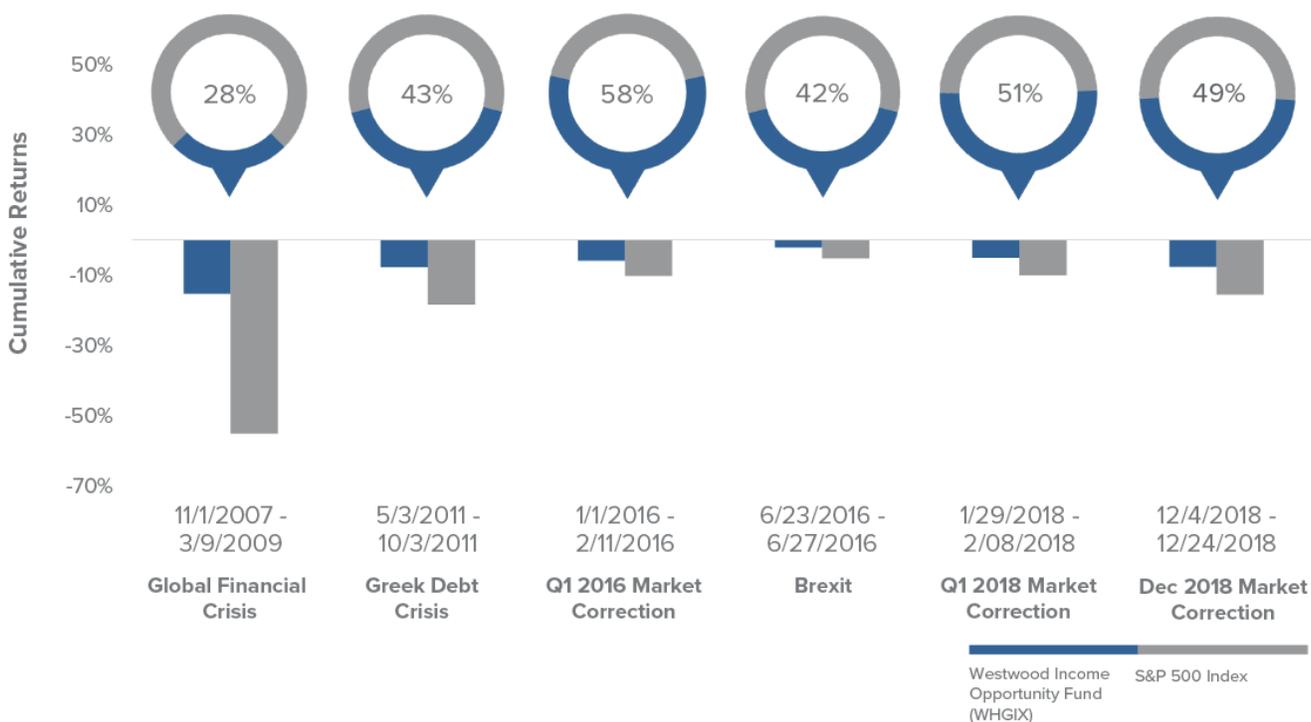




Data Source: Bloomberg, 12/31/2016 – 12/31/2018. From the Chicago Board Options Exchange website, www.cboe.com: The VIX Index is a calculation designed to produce a measure of constant, 30-day expected volatility of the U.S. stock market, derived from real-time, mid-quote prices of S&P 500® Index (SPXSM) call and put options. On a global basis, it is one of the most recognized measures of volatility — widely reported by financial media and closely followed by a variety of market participants as a daily market indicator.

Westwood Income Opportunity (WHGIX) can help limit downside equity volatility while participating in up markets.

Westwood Income Opportunity (WHGIX) | **Emphasis on Loss Limitation**
Downside Market Capture During Periods of Market Distress



Annualized performance for WHGIX as of 12/31/2018 is: One Yr: -4.87%: Three Yrs: 4.03%: Five Yrs:

3.66%; Ten Yrs: 7.29%. Annualized performance for the blended benchmark as of 12/31/2018 is: One Yr: -1.31%; Three Yrs: 3.98%; Five Yrs: 5.22%; Ten Yrs: 7.43%. Expense ratio: 0.86%

The performance data quoted represents past performance. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost and current performance may be lower or higher than the performance quoted. For performance data current to the most recent month end, please call 1.877.FUND.WHG.

Data Source: © FactSet Research Systems Inc.

The Blended Benchmark consists of a 25% weighting of the S&P 500 Index, a 25% weighting of the NAREIT All Equity Index, a 25% weighting of the FTSE 3-Month Treasury Bill Index, and a 25% weighting of the FTSE 10 Yr Treasury Index.

The S&P 500 Index is a market value weighted index consisting of 500 stocks chosen for market size, liquidity, and industry group representation, with each stock's weight in the Index proportionate to its market value. The FTSE NAREIT All Equity Index is an unmanaged capitalization-weighted index that includes all tax-qualified REITs listed on the NY Stock Exchange, NASDAQ, and the American Stock Exchange. The FTSE 3-Month Treasury Bill Index is an unmanaged index composed of three month Treasury bills. The FTSE 10-Year Treasury Index is an unmanaged index composed of ten-year Treasury bonds and notes. The Benchmark Indices' returns do not reflect any management fees, transaction costs, or expenses. Investors cannot invest directly in an index.

**Westwood
Multi-Asset
Approach**

**Income
Opportunity
Fund**

WHGIX

Contact Us



The Westwood Income Opportunity Fund is distributed by SEI Investments Distribution Co., which is not affiliated with the Advisor. Performance Data Source: SEI Investments Co.

Mutual fund investing involves risk, including possible loss of principal. There can be no assurance that the Fund will achieve its stated objectives. Bonds and bond funds will decrease in value as interest rates rise. High yield bonds are highly speculative and carry a greater degree of risk. High yield bonds held by the fund are subject to greater credit risk, which raises the potential likelihood for the bonds to default on principal and interest payments. REIT investments are subject to changes in economic conditions, credit risk and interest rate fluctuations. Investments in securities of MLPs involve risk that differ from investments in common stock including risks related to limited control and limited rights to vote on matters affecting the MLP. MLP common units and other equity securities can be affected by economic and other factors affecting the stock market in general, expectations of interest rates, investor sentiment towards MLPs or the energy sector, changes in a particular issuer's financial condition, or unfavorable or unanticipated poor performance of a particular issuer. There can be no assurance that the Fund will achieve its stated objectives. A company may reduce or eliminate its dividend, causing losses to the fund. Diversification does not protect against market loss.

The Westwood Funds are distributed by SEI Investments Distribution Co. (SIDCO). SIDCO is not affiliated with Westwood Holdings Group, Inc. or any other affiliate. SIDCO is located at 1 Freedom Valley Drive, Oaks PA 19456.

To determine if this Fund is an appropriate investment for you, carefully consider the Fund's investment objectives, risk factors and charges and expenses before investing. This and other information can be found in the Fund's prospectus which may be obtained by calling 1.877.FUND.WHG (1.877.386.3944). Please read the prospectus carefully before investing.

Mutual fund investing involves risk, including the possible loss of principal.