

Introducing Principal Asset Management

On October 10, 2022, Principal Global Investors begins a new chapter in our history. To highlight our asset management capabilities, we'll do business as Principal Asset Management.

We are not changing our legal or regulated entity names, but we have a new look and trade name to accurately showcase our commitment to asset management as a core strength of Principal.

This doesn't change the independence of our investment teams who will continue to manage their own processes and teams, aligned with our global investment network and its guiding principles. It solidifies our commitment and focus on delivering local insights, global perspectives, and differentiated investment capabilities across more than 80 markets.

Experience the transformation with our reimagined digital experience at www.PrincipalAM.com—giving you access to all our product offerings, unique thought capital, and timely market driven perspectives in one place.

Below are answers to some important questions you may have. We look forward to connecting with you and sharing our excitement for the future.

If you have any questions, please reach out to your Principal representative or relationship manager.

Announcements and communications

You may see various communication from our Principal Asset Management teams over the coming days and weeks. We're excited to share this moment in history with you and want to ensure you are informed.

Branded materials

The evolution of our materials (client reports, fact sheets, commentaries, etc.) will take a few months to fully implement globally. When we're done, they'll all align to our new brand for a cohesive experience.

Doing Business As (DBA) names

Effective October 10, 2022, Principal Global Investors (Europe) Limited and Principal Global Investors (EU) Limited will primarily conduct business as Principal Asset Management. The legal names for Principal Global Investors (Europe) Limited and Principal Global Investors (EU) Limited haven't changed.

Certain "doing business as" names representing our specialized investment teams were simplified and updated as follows:

- **Principal Aligned** is an investment team within Principal Global Investors, LLC.
- **Principal Asset Allocation** is an investment team within Principal Global Investors, LLC.
- **Principal Claritas*** is a trade name of Claritas Investments, LTD, an affiliate of Principal Global Investors, LLC.
- **Principal Edge** is an investment team within Principal Global Investors, LLC.
- **Principal Equities** is an investment team within Principal Global Investors, LLC.
- **Principal Finisterre** is an investment team within, and a trade name of, Principal Global Investors (Europe) Limited.
- **Principal Fixed Income** is an investment team within Principal Global Investors, LLC.
- **Principal Morley** is an investment team within Principal Global Investors, LLC.
- **Principal Origin*** is a trade name of Origin Asset Management LLP, an affiliate of Principal Global Investors, LLC.
- **Principal Real Estate*** is a trade name of Principal Real Estate Limited, Principal Real Estate SAS, and Principal Real Estate Spezialfondsgesellschaft mbH.
- **Spectrum Asset Management** and **Post Advisory Group** remain unchanged.

*These investment teams didn't change their legal names but will now have trade names as noted.

No change to fund names

Legal fund names will stay the same.

Enhanced digital experience

PrincipalAM.com provides access to all product offerings, unique global thought capital, and timely market driven perspectives in one place. This single, best-in-class web experience consolidates four existing web properties into one. The following websites will redirect to PrincipalAM.com for a period of time during this transition.

Principalglobal.com
Principalfunds.com
PrincipalETFs.com
PrincipalReEurope.com

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PrincipalAM.com

Clients who access our UCITS funds will continue to be directed to FundInfo.com from PrincipalAM.com for fact sheets and fund information.

How to find us in databases

In the coming weeks, changes in the databases below will reflect our new brand.

In the following databases, you'll see our **investment teams listed as one brand**—Principal Asset Management. Strategy names under Principal Asset Management will be more defined and you'll still find our investment teams and their products when searching by name (Aligned, Edge, Finisterre, Morley, Origin, Principal, and Spectrum).

- eVestment
- IMGD – Investment Metrics
- Callan
- Morningstar
- Informa
- Cambridge
- Wilshire
- DeMarche
- Broadridge
- Albourne

In the following databases, our investment teams are already listed under one brand. We'll **update our brand name** from Principal Global Investors to Principal Asset Management. Strategy names under Principal Asset Management will be more defined and you'll still find our investment teams and their products when searching by name (Aligned, Edge, Finisterre, Morley, Origin, Principal, and Spectrum).

- Mercer GIMD
- LCG Associates
- Alphaport
- GMR – Global Manager Research
- CamraData

Principal Asset ManagementSM is a trade name of Principal Global Investors, LLC.

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