



## Wellington Management

A TRUSTED PARTNER TO INVESTORS WORLDWIDE

Tracing our history to 1928, Wellington Management is one of the largest independent investment management firms in the world. As a private firm whose sole business is investment management, our long-term view and interests are aligned with those of our clients.

**\$1.3T+**

Client assets under  
management (USD)

**60+**

Client locations  
by country/region

**800+**

Investment  
professionals

**3000+**

Clients



## Aiming to deliver excellence for our clients

Our mission is to exceed the investment objectives and service expectations of our clients worldwide by offering comprehensive capabilities that span nearly all segments of the global capital markets, including equity, fixed income, multi-asset, and alternative strategies.

With more than 800 investment professionals located in offices around the world, Wellington pairs deep multidisciplinary research resources with independent investment teams operating in an entrepreneurial “boutique” environment.

## Culture aligned with client values



### PRIVATE PARTNERSHIP

Fosters a long-term view that aligns our perspectives with those of our clients.



### RIGOROUS PROPRIETARY RESEARCH

Investment teams are empowered to develop their own philosophy and process.



### SINGULAR FOCUS ON INVESTMENT MANAGEMENT

Providing targeted solutions that span markets and asset classes.



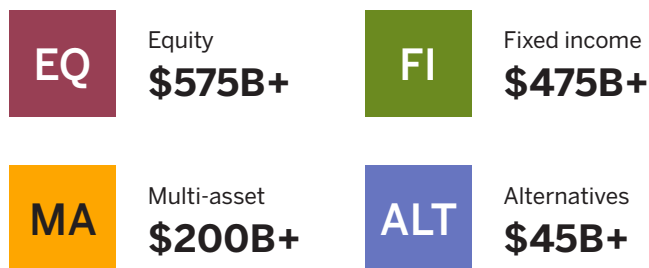
### OPEN, COLLABORATIVE CULTURE

We believe healthy debate and diversity of thought are essential for informed decision making.

## WELLINGTON MANAGEMENT'S MORNING MEETING

Every day, hundreds of portfolio managers, research analysts, and other investment professionals — connecting remotely from our offices around the world — gather together to discuss timely investment ideas.

## AUM by asset class (USD):<sup>1</sup>



## Firm initiatives and partnerships

Along with our extensive research on sustainable investing, we partner with leading organizations to educate ourselves and provide leadership on asset-management perspectives.



<sup>1</sup>All figures are for the Wellington Management Group of companies as of December 2025.

# Global presence

With offices around the world, our investment and relationship management teams can help you solve issues specific to your investment environment, in your time zone.



## IMPORTANT INFORMATION

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