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Contact:
Paul Solli
Aperio Group LLC
415-339-4304
psolli@aperiogroup.com

Aperio Group Announces Global Natural Resources Equity Strategy Achieves Three-Year Performance Record

Aperio's Global Natural Resources Equity Strategy offers a public equity alternative designed to capture commodity exposure

Sausalito, CA—[Aperio Group](#), a research-based investment management firm specializing in hyper-customized portfolios designed to meet the specific tax, risk, and values-based/ESG goals of advisors and their clients, announces that its Global Natural Resources Equity Strategy is celebrating its three-year anniversary.

The Global Natural Resources Equity Strategy is designed to provide exposure to commodity markets through investments in natural resource equities which Aperio believes will provide returns with strong ties to the performance of commodities over a given time period. For taxable investors with tax losses, the strategy may also be utilized in conjunction with Aperio's tax-loss harvesting techniques to potentially improve the investor's after-tax returns.

Financial advisors are becoming increasingly concerned with protecting their clients from potential future inflation. When looking to hedge inflation using commodities, they are finding that the existing forward- and futures-based products have, for the most part, dramatically underperformed spot commodity prices due to contango and other structural challenges. Aperio's strategy seeks to avoid the contango problem while achieving exposure to commodities.

"Public equity indexes have a relatively small exposure to natural resource equities. For an investor concerned about inflation, this exposure falls far short of what is required to protect the purchasing power of their portfolio. We believe that the Global Natural Resources Equity Strategy allows investors to capture commodity exposure in a customized, low-cost, tax-efficient, index approach while minimizing the negative impact of contango associated with futures-based solutions," says Pete Hand, Aperio's Director of Quantitative Strategies.

Aperio's strategies are available in separately managed accounts (SMAs) through select intermediaries approved by Aperio at a \$1 million minimum.

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