



SGA's CEO Cynthia Tusan, CFA featured in Emerging Manager Monthly

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[Strategic Global Advisors Continues To Innovate Through Growth](#)

MARKET UPDATE

- Markets advanced as expectations eased for a prolonged period of elevated interest rates.
- Global GDP growth is expected to decelerate from 3.0% in 2023, to 2.9% in 2024.
- Among developed countries, the U.S. economy has exhibited unexpected resilience.

An Introduction to SGA's Academic Advisory Board

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Gary Baierl, PhD
Chief Investment Officer

International Equity

Inception Date: 11/30/2005			Annualized					ITD
	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	
SGA (Gross)	10.49%	22.40%	22.40%	5.02%	7.78%	6.39%	4.96%	6.01%
SGA (Net)	10.29%	21.55%	21.55%	4.27%	7.00%	5.58%	4.09%	5.06%
MSCI EAFE (Net)	10.42%	18.24%	18.24%	4.02%	8.16%	6.91%	4.28%	4.65%
SGA Excess (Gross)	0.07%	4.16%	4.16%	1.00%	-0.38%	-0.52%	0.68%	1.36%

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International ADR Equity

Inception Date: 6/30/2006			Annualized					ITD
	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	
SGA (Gross)	10.03%	20.31%	20.31%	4.84%	8.56%	6.92%	5.42%	5.31%
SGA (Net)	9.84%	19.47%	19.47%	4.08%	7.77%	6.11%	4.57%	4.42%
MSCI EAFE (Net)	10.42%	18.24%	18.24%	4.02%	8.16%	6.91%	4.28%	3.96%
SGA Excess (Gross)	-0.39%	2.07%	2.07%	0.82%	0.40%	0.01%	1.14%	1.35%

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International ACWI ex-U.S. Equity			Annualized					
Inception Date: 6/30/2015	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	9.21%	21.64%	21.64%	4.62%	8.37%	7.43%	-	5.38%
SGA (Net)	8.98%	20.61%	20.61%	3.74%	7.45%	6.51%	-	4.45%
MSCI ACWI ex USA (Net)	9.75%	15.62%	15.62%	1.55%	7.08%	6.33%	-	4.52%
SGA Excess (Gross)	-0.54%	6.02%	6.02%	3.07%	1.29%	1.10%	-	0.86%
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International World ex-U.S. Equity			Annualized					
Inception Date: 12/31/2013	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	10.52%	22.29%	22.29%	5.36%	7.99%	6.67%	5.36%	5.36%
SGA (Net)	10.35%	21.56%	21.56%	4.53%	7.04%	5.71%	4.38%	4.38%
MSCI World ex USA (Net)	10.51%	17.94%	17.94%	4.42%	8.45%	6.95%	4.32%	4.32%
SGA Excess (Gross)	0.01%	4.35%	4.35%	0.94%	-0.46%	-0.28%	1.04%	1.04%
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International Small Cap Equity			Annualized					
Inception Date: 3/31/2010	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	11.38%	15.77%	15.77%	1.58%	6.60%	5.92%	5.17%	8.53%
SGA (Net)	11.13%	14.74%	14.74%	0.67%	5.65%	4.91%	4.00%	7.21%
MSCI World ex USA Small Cap (Net)	10.60%	12.62%	12.62%	-0.20%	7.05%	6.06%	4.63%	6.26%
SGA Excess (Gross)	0.78%	3.15%	3.15%	1.78%	-0.45%	-0.14%	0.54%	2.27%
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International All Cap Equity			Annualized					
Inception Date: 4/30/2008	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	9.96%	19.99%	19.99%	5.53%	9.40%	7.84%	6.13%	5.36%
SGA (Net)	9.75%	19.10%	19.10%	4.69%	8.51%	6.94%	5.19%	4.38%
MSCI EAFE Small Cap (Net)	10.52%	17.18%	17.18%	3.73%	8.24%	6.82%	4.35%	3.25%
SGA Excess (Gross)	-0.56%	2.81%	2.81%	1.80%	1.16%	1.02%	1.78%	2.11%
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International SMID Cap Equity			Annualized					
Inception Date: 9/30/2006	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	10.59%	17.71%	17.71%	1.72%	5.93%	6.12%	5.72%	5.76%
SGA (Net)	10.40%	16.90%	16.90%	0.92%	5.04%	5.15%	4.57%	4.43%
MSCI EAFE SMID Cap (Net)	10.84%	15.05%	15.05%	-0.31%	6.53%	5.86%	4.52%	4.27%
SGA Excess (Gross)	-0.25%	2.66%	2.66%	2.03%	-0.60%	0.26%	1.20%	1.49%
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Global Equity			Annualized					
Inception Date: 10/31/2013	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	11.05%	25.82%	25.82%	9.66%	12.84%	10.73%	9.34%	9.87%
SGA (Net)	10.88%	25.07%	25.07%	8.92%	12.05%	9.91%	8.45%	8.97%
MSCI World (Net)	11.42%	23.79%	23.79%	7.27%	12.80%	10.73%	8.60%	8.87%
SGA Excess (Gross)	-0.37%	2.03%	2.03%	2.39%	0.04%	0.00%	0.74%	1.00%

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U.S. Large Cap Equity			Annualized					
Inception Date: 6/30/2007	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	11.66%	25.25%	25.25%	10.99%	14.92%	12.97%	11.46%	9.68%
SGA (Net)	11.53%	24.69%	24.69%	10.44%	14.32%	12.36%	10.78%	8.96%
Russell 1000 (Gross)	11.96%	26.53%	26.53%	8.97%	15.52%	13.21%	11.80%	9.41%
SGA Excess (Gross)	-0.30%	-1.28%	-1.28%	2.02%	-0.60%	-0.24%	-0.34%	0.27%

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U.S. Small Cap Equity			Annualized					
Inception Date: 12/31/2018	QTD	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	ITD
SGA (Gross)	11.83%	19.21%	19.21%	11.85%	13.70%	-	-	13.70%
SGA (Net)	11.63%	18.38%	18.38%	11.08%	12.92%	-	-	12.92%
Russell 2000 (Gross)	14.03%	16.93%	16.93%	2.22%	9.97%	-	-	9.97%
SGA Excess (Gross)	-2.20%	2.28%	2.28%	9.63%	3.73%	-	-	3.73%

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