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# Envestnet and Invesco Introduce Model Portfolios that Blend Active and Passive Management

## Suite of ActivePassive Portfolios Pair Leading Invesco Funds with Portfolio Construction and Asset Allocation by Envestnet | PMC

CHICAGO, Jan. 16, 2020 /PRNewswire/ -- Envestnet | PMC and Invesco today introduced seven new model portfolios — now available on the Envestnet platform — that optimize the advantages of both active and passive fund management. By pairing high-performing mutual funds from Invesco with portfolio construction and asset allocation led by experts at Envestnet | PMC, the portfolio consulting group of Envestnet, the companies have created a suite of products that may allow advisors and investors to enhance returns, improve diversification, reduce volatility and manage downside risk.



"This active versus passive debate is age-old, but our research continues to show that there are distinct advantages to both," said Ryan Tagal, director of product management, Envestnet | PMC. "It's a matter of knowing where an asset manager adds value and selecting the right manager in those cases. That's the research and due diligence that guided the development of these model portfolios. The Invesco PMC ActivePassive portfolios also include liquid alternative mutual funds, which we believe provide better protection against potential drawdowns in challenging equity markets."

The Invesco PMC ActivePassive Portfolios are designed for a variety of investor objectives and risk profiles, from capital preservation to moderate growth to aggressive. Each portfolio consists of a combination of actively managed mutual funds from Invesco and low-cost, tax-efficient index funds, all of which Envestnet | PMC has identified as best-in-breed. The Invesco PMC ActivePassive Portfolios are the only Envestnet | PMC-managed ActivePassive portfolios available with liquid alternatives.

These portfolios are an evolution of the ActivePassive suite of portfolios built in partnership between Envestnet | PMC and OppenheimerFunds. Following Invesco's acquisition of OppenheimerFunds in 2019, Envestnet | PMC's portfolio managers now have additional funds and capabilities to choose from, giving them more flexibility in how they express their

investment views.

For nearly 12 years, Envestnet | PMC has been producing models that combine active and passive funds. Including these latest offerings, the company offers various ActivePassive Portfolios, accounting for \$4 billion in assets under management on the Envestnet platform.

### **About Envestnet**

Envestnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Envestnet's unified technology empowers enterprises and advisors to more fully understand clients, and deliver actionable intelligence that drives better outcomes and improves lives.

**Envestnet Wealth Solutions** enables enterprises and advisors to better manage client outcomes and strengthen their practices through its leading Wealth Management Operating System and advanced portfolio solutions. **Envestnet | PMC** provides the experience and solutions — from comprehensive manager research to portfolio consulting and portfolio management — to help improve client outcomes. **Envestnet | Tamarac** provides portfolio management, reporting, trading, rebalancing and client portal solutions for registered independent advisers (RIAs). **Envestnet | MoneyGuide** provides goals-based financial planning applications. **Envestnet Data & Analytics** enables innovation and insights through its **Envestnet | Yodlee** data aggregation platform.

More than 100,000 advisors and more than 4,700 companies including: 16 of the 20 largest U.S. banks, 43 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs and hundreds of internet services companies, leverage Envestnet technology and services. Envestnet solutions enhance knowledge of the client, accelerate client onboarding, improve client digital experiences, and help drive better outcomes for enterprises, advisors and their clients.

For more information about Envestnet | PMC, please visit [investpmc.com](http://investpmc.com).

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