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SEI Expands Direct Index Equity SMA Options

New SEI-Managed and Third-Party Investment Options Elevate Experience and Tax Optimization for Advisors and Investors

OAKS, Pa., March 31, 2025 /PRNewswire/ -- [SEI](#)® (NASDAQ:SEIC) today announced the continued expansion of its direct index separately managed account (SMA) strategies, as well as enhancements to its unified managed account (UMA) solutions, to integrate these strategies into model portfolios constructed to better serve financial advisors and their clients with sophisticated, scalable, and tax-efficient investment solutions.

Designed to serve mass-affluent, high-net-worth, and ultra-high-net-worth investors, the new strategies, which are crafted to hold underlying securities that mirror the attributes of a selected index, include:

- **SEI Investment Management Corporation:** The Systematic S&P 500® Core, Systematic U.S. SMID Cap Core, and Systematic U.S. Small Cap Core strategies join the existing robust lineup of direct index equity and fixed income solutions.
- **Parametric Portfolio Associates:** The Custom Core U.S. Large Cap – S&P 500®, Custom Core U.S. Mid and Small Cap 1000, and Custom Core U.S. Small Cap strategies join an existing broad set of Parametric's Custom Core® Equity solutions.

Erich Holland, Head of Client Experience for SEI's Advisor business, said:

"The expansion of our direct index SMAs underscores three major trends in the advisor segment today: the increasing demand for solutions to optimize tax-efficiency, the combination of public beta and private alpha into UMA investment strategies, and the expansion of model adoption to integrate these sophisticated investment solutions at scale. And with technology at the core of delivery, everything we're doing is through the lens of enhancing the client experience."

To help bolster tax optimization, SEI's Systematic Core Strategies and other tax-managed models and SMAs seek to opportunistically harvest tax losses during periods of market volatility and defer gains for tax efficiency. SEI provides a personalized ["Estimated Taxes Saved" report](#) to advisors that includes client-specific information about estimated year-to-date taxes saved (or incurred) by performing active tax management.

Jim Smigiel, SEI's Chief Investment Officer, said:

"Our goal remains on designing and offering best-in-class solutions that help anticipate and solve for specific client needs. By broadening our direct index equity SMAs with additional SEI Systematic Core strategies and Parametric Custom Core strategies, we continue to offer flexible, customizable, and tax-optimized solutions that support advisors striving to deliver better client outcomes through institutional-quality investment solutions."

With the growing demand for personalization in wealth management, firms are increasingly integrating direct index solutions and custom SMAs to offer personalized portfolios that can minimize clients' tax bills. SMAs offer individualized strategies run by distinct professional managers, while UMAs provide a comprehensive investment solution that combines multiple strategies within a single account structure. UMAs can also deliver sophisticated tax optimization that seeks to enhance after-tax returns, improve client outcomes, and reinforce an advisor's value proposition.

About SEI®

SEI (NASDAQ:SEIC) is a leading global provider of financial technology, operations, and asset management services within the financial services industry. SEI tailors its solutions and services to help clients more effectively deploy their capital—whether that's money, time, or talent—so they can better serve their clients and achieve their growth objectives. As of Dec. 31, 2024, SEI manages, advises, or administers approximately \$1.6 trillion in assets. For more information, visit seic.com.

Important Information

Information in the U.S. provided by SEI Investments Management Corporation (SIMC), a federally registered investment advisor and wholly owned subsidiary of SEI Investments Company (SEI). For those portfolios of individually managed securities, SIMC makes recommendations as to which manager will manage each asset class. Separately managed accounts are offered through the Managed Account Solutions program.

Neither SEI nor its affiliates provide tax advice. Please note that (i) any discussion of U.S. tax matters contained in this communication cannot be used by you for the purpose of avoiding tax penalties; (ii) this communication was written to support the promotion or marketing of the matters addressed herein; and (iii) you should seek advice based on your particular circumstances from an independent tax advisor.

Investing involves risk, including the potential loss of principal. There is no assurance investment goals will be met. Tracking error risk is the risk that the performance of a portfolio designed to track an index may vary substantially from the performance of the benchmark index it tracks as a result of cash flows, portfolio expenses, imperfect correlation between the portfolio's and benchmark's investments and other factors. This risk is magnified when sampling a benchmark index as the strategy may not track the return of its benchmark index as well as it would have if the strategy purchased all of the securities in its benchmark index.

Beta measures an investment's volatility or sensitivity to market movements, indicating how much an investment's price tends to fluctuate relative to the overall market.

Alpha is the measure of an investment's performance on a risk-adjusted basis, representing the excess return an investment generates compared to a benchmark.

Emily Baldwin

SEI

+1 610-676-3262

ebaldwin@seic.com

Eric Hazard

Vested

+1 917-765-8720

eric@fullyvested.com

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