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SEI Strengthens Manager Research Service with Customizable Solution

Janney Montgomery Scott Expands SEI Relationship, Signs On for Comprehensive Service, Qualitative Analysis

OAKS, Pa., Feb. 5, 2018 /PRNewswire/ -- SEI (NASDAQ: SEIC) today announced the expansion of the company's Manager Research solution, which provides registered investment advisors, private banks, and broker dealers with an outsourced, stand-alone research service for evaluating and selecting portfolio managers. SEI's Manager Research solution offers a wide range of service levels that can be customized to meet clients' unique needs and price points.

For more than 30 years, manager research has been a core competency for SEI, combining people, process, and technology to identify, evaluate, select, and monitor managers in SEI funds and separate accounts. Janney Montgomery Scott LLC (Janney) has expanded its current relationship with SEI, which will provide Janney with SEI's investment analysis and opinion of equity and fixed-income mandates available through Janney's separate account program, as well as asset manager contracting, model delivery services, and customized reporting.

"SEI's Manager Research solution provides a variety of scalable, customizable solutions that help us deliver the best possible service to our clients, as well as meet our recruiting needs and future growth," said Robert Battista, Vice President and Head of Product & Research at Janney. "As a strategic partner, SEI continues to help us maintain our open-architecture investment platform, and we look forward to continuing our relationship over the coming years."

"We are excited for this growth opportunity to provide holistic, integrated solutions that will enable Janney to focus on serving its advisors and clients," said Kevin Barr, Executive Vice President and Head of the Investment Management Unit at SEI. "Every asset owner and fiduciary needs to decide if they're going to buy, build, or blend to meet the multiple objectives tugging at them. SEI's Manager Research solution provides them the tools and strategic partnership to help drive their businesses while retaining control over the final decision of manager selection."

SEI's Manager Research solution features:

- **Manager due diligence and evaluation** based on in-depth, qualitative analysis. This approach enables the separation of skillful managers from those providing inexpensively replicable market exposure. SEI's capabilities extend across many asset classes, including equity, fixed-income, multi-asset, commodities, currencies, and alternatives.
- **Various tiers of service** to meet clients' specific business and pricing needs. SEI offers options that range from basic structured insights to full, in-depth evaluations with regular monitoring and analyst access.
- **Integrated implementation solutions** to complement clients' existing relationships and infrastructure, including portfolio construction, model delivery, manager contracting, custom reporting, etc.

With the ability to bundle volume, data, quality, and depth together, SEI makes investment assessments based on the company's due diligence on a breadth of managers under research. The company's Manager Research solution is supported by more than 110 members of the company's Investment Management Unit, which includes the global research team.

About Janney Montgomery Scott
Janney provides advice to individual, corporate, and institutional clients. Our expertise includes guidance about asset management, corporate and public finance, equity and fixed income investing, equity research, institutional equity and fixed income sales and trading, investment strategy, financial planning, mergers and acquisitions, public and private capital raising, portfolio management, retirement and income planning, and wealth management. Janney is an independently-operated subsidiary of The Penn Mutual Life Insurance Company and is a member of the Financial Industry Regulatory Authority (FINRA), and Securities Investor Protection Corporation (SIPC). Additional company information is available at www.janney.com.

About SEI's Asset Management Distribution Team
SEI's Asset Management Distribution Team provides customized strategic partnerships enabling open-architecture investment solutions aligned to end-investors' goals, supporting leading financial service intermediaries globally. The group helps large distributors in North America, Europe and Asia implement a goals-based advice framework that combines the behavioral finance approach pioneered by SEI with the client's proprietary advice platform to create a distinct end-client offering. SEI's Asset Management Distribution Team is a part of the Private Banking business unit of SEI. For more information, visit www.seic.com/amd.

About SEI
Now in its 50th year of business, SEI (NASDAQ:SEIC) is a leading global provider of investment processing, investment management, and investment operations solutions that help corporations, financial institutions, financial advisors, and ultra-high-net-worth families create and manage wealth. As of December 31, 2017, through its subsidiaries and partnerships in which the company has a significant interest, SEI manages, advises or administers $861 billion in hedge, private equity, mutual fund and pooled or separately managed assets, including $337 billion in assets under management and $518 billion in client assets under administration. For more information, visit: seic.com.

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