



NEWS RELEASE

Ivy Distributors, Inc.

6300 Lamar Avenue
Overland Park, KS 66202
TOLL FREE 800 532 2780
ivyinvestments.com

Ivy introduces model delivery for seven equity strategies

Ivy enters model portfolio delivery business; models to be available through third-party SMAs

Overland Park, KS—April 16, 2019 – Ivy Investments is now offering seven strategies in a model-delivery format, to be available in retail separately managed accounts (SMA) and unified managed accounts (UMA), providing advisors and investors a new way to access existing strategies.

“It’s important for us to offer vehicle flexibility to distributors and advisors as they look to our investment strategies,” said Amy Scupham, president of Ivy Distributors, Inc. “These model delivery products provide key Ivy equity strategies at an attractive price point and help us remain competitive and adaptable to advisor and investor needs.”

The new strategies include:

Model-Delivered Strategy	Model Morningstar I.D.
Ivy Energy	F00001 1DSQ
Ivy Focused Growth	F00001 1DSR
Ivy Focused Value	F00001 1DSS
Ivy Mid Cap Growth	F00001 1DST
Ivy Mid Cap Income Opportunities	F00001 1DSU
Ivy Science and Technology	F00001 1DSV
Ivy Small Cap Growth	F00001 1DSX

Each model portfolio utilizes the same investment process and approach as similar respective strategies managed by Ivy Investment Management Company, including retail mutual funds in the Ivy Funds family. The models do not invest in derivatives or non-U.S. listed securities.

“As we talk to broker-dealers and advisors, there is increasing interest in access to Ivy strategies for use in the model delivery structure as they work to meet the changing needs of clients,” said Scupham.

In fact, according to the *Product Management & Development 2018* report recently released by FUSE Research Network, more than 60% of firms indicated that model-delivered SMAs will be a top product



structure over the next 12 months, driven by a shift from commission-based to fee-based business practices.

“Moving forward, we expect model-delivered SMAs to play a growing role in product development plans as asset managers look to expand their distribution efforts and investors’ demand for customized investment strategies increases,” said Patrick Newcomb, Director of BenchMark Research, FUSE Research Network.

Ivy Investment Management Company has finalized a contract with the Envestnet platform, where the strategies can be broadly accessed. Negotiations with other firms and platforms are ongoing.

Ivy has partnered with operations and technology provider Archer, which will support data management and delivery of models across strategies.

Strategies are only provided through separately managed accounts program sponsors. Check with your financial advisor for availability.

Past performance is not a guarantee of future results. Investment return and principal value will fluctuate, and it is possible to lose money by investing. Please refer to Ivy Investment Management Company’s Form ADV Part 2A for additional risk information concerning the investment strategies offered by Ivy.

IVY INVESTMENTS® refers to the investment management and investment advisory services offered by Ivy Investment Management Company, the financial services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS® mutual funds and IVY VARIABLE INSURANCE PORTFOLIOSSM, and the financial services offered by their affiliates.