

PRESS RELEASE

Macquarie Asset Management announces plan to consolidate brands for US wealth investment solutions

- *“Macquarie” to be adopted as headline brand for all investment offerings*
- *Initiative aims to simplify and optimize the client experience, including streamlining mutual fund line-up*
- *Transition to take place over the next 12-18 months*

PHILADELPHIA, Jan. 17, 2024 –Today, Macquarie Asset Management announced plans to transition to a unified brand structure in the US wealth channel, featuring “Macquarie” as the flagship product brand for all investment solutions. The initiative aims to simplify the client experience and reinforce Macquarie’s commitment to excellence in global investment capabilities and platform expertise, while delivering sustained, superior results over the long term.

The brand transition, which is inclusive of the Delaware Funds by Macquarie® mutual funds, Ivy strategies and Central Park Group offerings, will take place over the next 12-18 months.

The decision to consolidate under the Macquarie umbrella reflects the company’s dedication to providing institutions, financial advisors and their clients with a straightforward and compelling brand experience. Macquarie aims to strengthen its connection with advisors and investors across the full suite of solutions offered, ensuring an experience that mirrors its global reputation for delivering for investors.

This initiative follows the launch of the firm’s first three ETFs, which leverage the Macquarie brand: Macquarie Energy Transition ETF (PWER), Macquarie Global Listed Infrastructure ETF (BILD) and Macquarie Tax-Free USA Short Term ETF (STAX). These three funds, which launched in November 2023, reflect Macquarie’s deep expertise and experience, and as a result, leverage the Macquarie name.

Macquarie Asset Management will also be optimizing the client experience through updates to its mutual fund line-up. These enhancements include consolidating products by reducing the number of funds managed in similar styles and liquidating sub-scale funds. This strategic move will simplify the experience for investors, while maintaining consistency in the investment teams and how Macquarie manages money for clients.

To learn more about Macquarie Asset Management’s 2024 outlook for US wealth and retail investors, [click here](#).

About Macquarie Asset Management

Macquarie Asset Management is a global asset manager, integrated across public and private markets. Trusted by institutions, governments, foundations and individuals to

manage approximately \$US573 billion in assets, we provide a diverse range of investment solutions including real assets, real estate, credit and equities & multi-asset.

Macquarie Asset Management is part of Macquarie Group, a diversified financial group providing clients with asset management, finance, banking, advisory, and risk and capital solutions across debt, equity and commodities. Founded in 1969, Macquarie Group employs approximately 21,000+ in 34 markets and is listed on the Australian Securities Exchange.

All figures as at 30 September 2023.

Media inquiries

Lucy MacNichol

Macquarie Asset Management

PH: +1-267-809-2771

E: lucy.macnichol@macquarie.com

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