

EXPERIENCE**37**

Year Track Record as an Independent Business

COLLABORATIVE TEAM**29**

Investment Professionals

PORTFOLIO MANAGERS

Scott Ellis, CFA

James Faunce, CFA

Jen Ripper

John Swarr, CFA, ASA

Trevor Williams, CFA, CAIA

ASSETS**\$35.6B**

Insurance

\$1.3B

Pooled Vehicles

\$8.0B

Manager of Managers

Our Commitment

Penn Mutual Asset Management (“PMAM”) is focused on risk-based institutional asset management. We are fixed-income specialists dedicated to creating value through a prudent, thoughtful and rigorous investment decision-making process. We tailor our proven approach to generate solid risk-adjusted returns while balancing the need for capital preservation to achieve each investment objective.

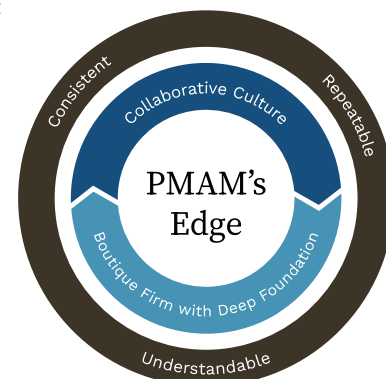
Our Edge**Collaborative Culture**

The ability to achieve each investment objective is largely dependent on the collaboration of a team of innovative and driven investment professionals. We believe in a collaborative culture that supports idea generation and decision-making. Our team-based approach to investment decision-making ensures an open and continuous dialogue among investment team members. A “trading desk environment” facilitates regular communication, and daily investment team meetings provide an open forum for idea sharing.

With diverse backgrounds, extensive experience and unique perspectives, our investment professionals bring a variety of complementary skill sets that guide our overall relative value-based investing methodology. It is our ability to combine our team’s unique insights into well-informed decisions that truly sets us apart.

Boutique Firm With Deep Foundation

We combine the financial stability and deep foundation of a well-established organization with the exceptional service and conviction of a boutique firm. We are nimble and opportunistic investors, creating value and generating alpha through right-sized total return strategies. Our investment team’s ability to move quickly and capitalize on opportunities is a key differentiator of our business. At PMAM, we take a tailored approach to investing, offering direct access to our team of investment professionals. We believe this approach encourages a collaborative relationship and provides full transparency as we navigate the markets to achieve each investment objective.

**Our Investment Capabilities**

With over \$44 billion in assets under management, we are dedicated to delivering exceptional service, exceeding expectations and earning trusted relationships by executing on our core asset management competencies, which include:

Our investment capabilities incorporate a unified investment philosophy and process across the risk spectrum.

Enhanced
CashShort Duration
BondCore Plus
BondHigh Yield
Bond

Offering a wide range of tailored investment strategies and solutions to help meet investment goals, while focusing on our mission to provide exceptional experience and service.

Contact

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