



The scientific pursuit of  
*a better way to invest*

Dimensional at a Glance\*



A Different Way to Invest



A Long Track Record of Outperformance



\*Firmwide assets under management in USD (billions), number of employees, and offices as of December 31, 2024. Past performance is no guarantee of future results.

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# The Dimensional Difference

## On the leading edge *applying financial science*

A culture of academic inquiry has been Dimensional's bedrock from the start. Our firm is driven by an evidence-based approach, Nobel Prize-winning insights, and decades of expertise applying financial science to real-world portfolios.

Following the science of investing means we look past guesses about what company or sector might outperform—and beyond the arbitrary restrictions imposed by funds that merely track an index. Our rigorous, data-driven process reflects years of innovation and refinement, and this has historically translated into better returns for investors.

## Driven by *the power of markets*

Markets do an excellent job adjusting to new information and incorporating the expectations of millions of buyers and sellers into prices—in real time. Prices change based on what's happening right now and what people think will happen in the future. That means stock prices are a good representation of fair value. Research has shown that stock pickers, who try to outperform by finding pricing "mistakes," consistently underperform their benchmarks.

Rather than trying to find what markets got wrong, we use the information contained in prices to seek better returns and manage risk. Trusting markets means we take a less subjective, more systematic approach to investing, an approach we can implement consistently around the world and across asset classes.

## *Adding value at every turn*

Our science-based approach guides us at every point in the investment process, from conducting research to designing portfolios, to considering when and how to trade. We build portfolios that emphasize areas of the market that research shows have higher expected returns.

Our flexibility is another way we add value. As market prices change every day, a strategy that rebalances only once or twice a year, like most index funds, can leave returns on the table. At Dimensional, we buy and sell securities based on up-to-date information on what can improve returns.

## Investing better— *and living better*

A successful investment experience is about more than just returns. It's what comes from knowing that a transparent process backed by decades of research is powering every investment decision. Our goal is to help people live better—not just years from now, but today. We go where the science leads, continually innovating to help improve outcomes for investors.

To learn more about Dimensional Investing,  
please visit [dimensional.com](https://dimensional.com).

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Exhibit: A Long Track Record of Outperformance

Percentage of US-domiciled equity and fixed income funds that outperformed their benchmark as of December 31, 2024. **Data Sample:** The sample includes US-domiciled, USD-denominated open-end and exchange-traded funds (ETFs) in the following Morningstar categories. Non-Dimensional fund data provided by Morningstar. Dimensional fund data is provided by the fund accountant. Dimensional funds or subadvised funds whose access is or previously was limited to certain investors are excluded. Index funds, load-waived funds, and funds of funds are excluded from the industry sample. **Methodology:** The beginning samples include funds as of the start of the time period indicated. Each fund is evaluated relative to its primary prospectus benchmark. Where the full series of primary prospectus benchmark returns is unavailable, non-Dimensional funds are instead evaluated relative to their Morningstar category index. Outperformers are funds that survived the sample period and whose cumulative net return over the period exceeded that of their respective benchmark. We aggregate funds with multiple share classes to the strategy level. **Morningstar Categories (Equity):** Equity fund sample includes the following Morningstar historical categories: Diversified Emerging Markets, Europe Stock, Foreign Large Blend, Foreign Large Growth, Foreign Large Value, Foreign Small/Mid Blend, Foreign Small/Mid Growth, Foreign Small/Mid Value, Global Real Estate, Japan Stock, Large Blend, Large Growth, Large Value, Mid-Cap Blend, Mid-Cap Growth, Mid-Cap Value, Miscellaneous Region, Pacific/Asia ex-Japan Stock, Real Estate, Small Blend, Small Growth, Small Value, Global Large-Stock Blend, Global Large-Stock Growth, Global Large-Stock Value, and Global Small/Mid Stock. **Morningstar Categories (Fixed Income):** Fixed income fund sample includes the following Morningstar historical categories: Corporate Bond, High-Yield Bond, Inflation-Protected Bond, Intermediate Core Bond, Intermediate Core-Plus Bond, Long-Term Bond, Intermediate Government, Long Government, Muni California Intermediate, Muni California Long, Muni Massachusetts, Muni Minnesota, Muni National Intermediate, Muni National Long, Muni National Short, Muni New Jersey, Muni New York Intermediate, Muni New York Long, Muni Ohio, Muni Pennsylvania, Muni Single State Intermediate, Muni Single State Long, Muni Single State Short, Muni Target Maturity, Short Government, Short-Term Bond, Ultrashort Bond, Global Bond, and Global Bond-USD Hedged. **Index Data Sources:** Index data provided by Bloomberg, MSCI, Russell, FTSE Fixed Income LLC, and S&P Dow Jones Indices LLC. Bloomberg data provided by Bloomberg. MSCI data © MSCI 2025, all rights reserved. Frank Russell Company is the source and owner of the trademarks, service marks, and copyrights related to the Russell Indexes. FTSE fixed income indices © 2025 FTSE Fixed Income LLC. All rights reserved. S&P data © 2025 S&P Dow Jones Indices LLC, a division of S&P Global. All rights reserved. Indices are not available for direct investment. Their performance does not reflect the expenses associated with management of an actual portfolio. US-domiciled mutual funds and US-domiciled ETFs are not generally available for distribution outside the US.

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