



**Zacks**  
INVESTMENT MANAGEMENT

# “Dean’s List” of Investment Strategies

Ranked In The Top Of Their  
Respective Classes By  
Morningstar®

Q1 2025



# Zacks Small-Cap Equity Strategy

**Key Takeaway:** The Zacks Small Cap Equity Strategy seeks lower overall risk than the Russell 2000 Index, with higher reward relative to risk taken.



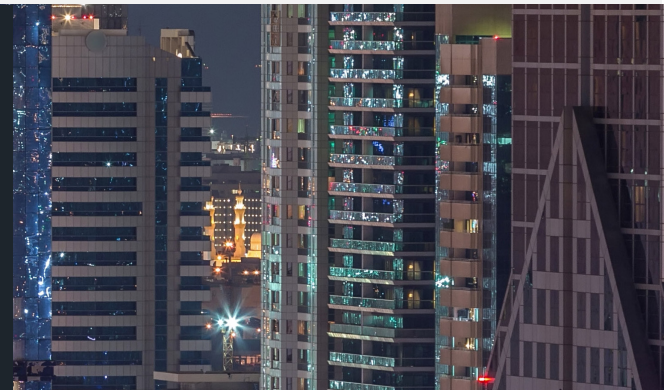
ZACKS SMALL CAP EQUITY STRATEGY  
Ranks in The Top 2%



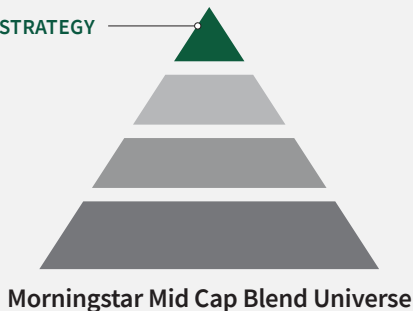
*The Zacks Small Cap Equity Strategy ranks in the top 2% out of 398 managers in the Morningstar Small Blend Universe.\**

# Zacks Mid-Cap Core Strategy

**Key Takeaway:** The Zacks Mid Cap Core Strategy seeks lower overall risk than the Russell Mid-Cap Index with higher reward relative to risk taken.



ZACKS MID CAP CORE STRATEGY  
Ranks in The Top 1%



*The Zacks Mid Cap Core Strategy ranks in the top 1% out of 230 managers in the Morningstar Mid Cap Blend Universe.\**

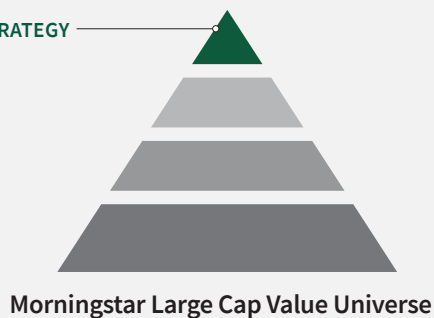
\* These ratings were awarded by Morningstar on 4/1/2025 in respect of the period from strategy inception to 3/31/2025 (Inception Dates: All Cap- 2/1/1995, Focus Growth- 2/1/2003, Dividend- 4/1/2004, Mid and Small Cap- 5/1/2009). We do not compensate Morningstar to obtain this rating. However, we pay compensation to Morningstar to use their logo in connection with advertising this rating. Please see full disclosure at end of this document.

# Zacks Dividend Strategy

**Key Takeaway:** The Zacks Dividend Strategy seeks lower overall risk than the Russell 1000 Value Index, with higher reward relative to risk taken.

ZACKS DIVIDEND STRATEGY

Ranks in The Top 4%



*The Zacks Dividend Strategy ranks in the top 4% out of 692 managers in the Morningstar Large Cap Value Universe.\**

# Zacks All-Cap Core Strategy

**Key Takeaway:** The Zacks All Cap Core Strategy seeks lower overall risk than the Russell 3000 Index, with higher reward relative to risk taken.

ZACKS ALL CAP CORE STRATEGY

Ranks in The Top 3%



*The Zacks All Cap Core Strategy ranks in the top 3% out of 468 managers in the Morningstar All Domestic Equity Managers Universe.\**

\* These ratings were awarded by Morningstar on 4/1/2025 in respect of the period from strategy inception to 3/31/2025 (Inception Dates: All Cap- 2/1/1995, Focus Growth- 2/1/2003, Dividend- 4/1/2004, Mid and Small Cap- 5/1/2009). We do not compensate Morningstar to obtain this rating. However, we pay compensation to Morningstar to use their logo in connection with advertising this rating. Please see full disclosure at end of this document.

# Zacks

## Focus Growth Strategy

**Key Takeaway:** The Zacks Focus Growth Strategy seeks to invest in large-cap stocks with high projected earnings growth to provide stronger returns than the Russell 1000 Growth Index.



**ZACKS FOCUS GROWTH STRATEGY**  
Ranks in The Top 5%



*The Zacks Focus Growth Strategy ranks in the top 5% out of 681 managers in the Morningstar Large Cap Growth Universe.\**

*\* These ratings were awarded by Morningstar on 4/1/2025 in respect of the period from strategy inception to 3/31/2025 (Inception Dates: All Cap- 2/1/1995, Focus Growth- 2/1/2003, Dividend- 4/1/2004, Mid and Small Cap- 5/1/2009). We do not compensate Morningstar to obtain this rating. However, we pay compensation to Morningstar to use their logo in connection with advertising this rating. Please see full disclosure at end of this document.*

**Past performance is no guarantee of future results. Inherent in any investment is the potential for loss.**

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The S&P 500 Index is a well-known, unmanaged index of the prices of 500 large-company common stocks, mainly blue-chip stocks, selected by Standard & Poor's. The S&P 500 Index assumes reinvestment of dividends but does not reflect advisory fees. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor. An investor cannot invest directly in an index.

The Russell 2000 Index is a well-known, unmanaged index of the prices of 2000 small-cap company common stocks, selected by Russell. The Russell 2000 Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot invest directly in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.

The Russell Midcap Index is a well-known, unmanaged index of the prices of approximately 800 mid-cap company common stocks, selected by Russell. The Russell Midcap Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot invest directly in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.

The Russell 1000 Value Index is a well-known, unmanaged index of the prices of 1000 large-company value common stocks selected by Russell. The Russell 1000 Value Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot directly invest in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.

The Russell 3000 Index is a well-known, unmanaged index of the prices of 3000 broad U.S. equity company common stocks, selected by Russell. The Russell 3000 Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot invest directly in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.

The Russell 1000 Growth Index is a well-known, unmanaged index of the prices of 1000 large-company growth common stocks selected by Russell. The Russell 1000 Growth Index assumes reinvestment of dividends but does not reflect advisory fees. An investor cannot invest directly in an index. The volatility of the benchmark may be materially different from the individual performance obtained by a specific investor.



## **Zacks Investment Management**

10 South Riverside Plaza, Suite 1600, Chicago, IL 60606

Toll free. (888) 775-8351 | [wholesale@zacks.com](mailto:wholesale@zacks.com) | [www.zacksim.com](http://www.zacksim.com)

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