

Voya Equity Solutions

At Voya Investment Management, our equity capabilities are carefully built to meet the long-term needs and goals of our clients. Our capabilities use a range of investment approaches, including fundamental, quantitative, thematic and machine intelligence, aiming to deliver best-in-class equity solutions through all phases of the market cycle.

	Inception ¹	Strategy Assets	Objective ²	Benchmark	Available Vehicles	eVestment Excess Returns Ranking ¹	eVestment IR Rankings ¹	
Fundamental	Large Cap Growth	05/01/04	\$8.7 billion	Target excess return: 2-3% Expected tracking error: 4-6%	Russell 1000 Growth Index or S&P 500 Index	Separate Account Collective Trust Mutual Fund SICAV	32	32
	Large Cap Value	01/01/08	\$4.8 billion	Target excess return: 1.5-3% Expected tracking error: 3-6%	Russell 1000 Value Index or S&P 500 Index	Separate Account Collective Trust Mutual Fund	17	2
	Mid Cap Growth	08/01/05	\$2.0 billion	Target excess return: 2-3% Expected tracking error: 4-6%	Russell Midcap Growth Index	Separate Account Collective Trust Mutual Fund	28	22
	Small Cap Growth	08/01/04	\$2.0 billion	Target excess return: 4-5% Expected tracking error: ~4%	Russell 2000 Growth Index	Separate Account Collective Trust Mutual Fund	56	49
Machine Intelligence (AI Driven)	MI Opportunistic U.S. Equity	08/01/20	\$4.6 million	Unconstrained approach that maximizes idiosyncratic alpha	Benchmark Agnostic	Separate Account	1	4
	MI Dynamic Small Cap	01/01/21	\$634.5 million	Seeks to maximize excess returns (3% and up) Moderate tracking error (5-8%)	Russell 2000 Index	Separate Account Collective Trust Mutual Fund	50	57
	MI Dynamic Global Equity	11/01/21	\$2.5 million	Seeks to maximize excess returns (3% and up) Moderate tracking error (5-8%)	MSCI World Net Index	Separate Account	-	-
	MI Dynamic International Equity	11/01/21	\$2.1 million	Seeks to maximize excess returns (3% and up) Moderate tracking error (5-8%)	MSCI EAFE Index	Separate Account	-	-
Factor-Based	Global High Dividend Low Volatility	01/01/17	\$1.9 billion	Target beta: 0.85 Target dividend yield: 1.5x benchmark	MSCI World Value Net Index	Separate Account Mutual Fund Variable Portfolio Closed-End Fund	40	31

As of 03/31/25. ¹ Dates and ranks are based on since inception except for Large Cap Growth which represents since team inception. Please note the eVestment rankings for Large Cap Growth and Large Cap Value are shown against the Russell 1000 Growth Index and Russell 1000 Value Index, respectively. The eVestment rankings for MI Opportunistic U.S. Equity are shown against the S&P 500 Index. ² There is no guarantee that this objective will be achieved. Targets are approximate and before management fees over full credit cycles.

Source: Voya Investment Management and eVestment Alliance. Please see disclosures for additional information. **Past performance does not guarantee future results.**

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Voya Equity: Pioneering the Future of Active Management

The future of equity investing will be defined by the successful integration of human expertise and machine intelligence



Clearly Defined Philosophies

By challenging conventional thinking and looking beyond traditional metrics, we are able to offer differentiated strategies.



Collaborative Alpha

We build on the experiences and capabilities across fundamental and systematic equity disciplines, creating a collective information advantage.



Innovation

Proprietary analytics such as explainable AI and interactive dashboards enrich our decision-making process, enhancing alpha potential and risk management.

Disclosures

Past performance does not guarantee future results. eVestment collects information directly from investment management firms and other sources believed to be reliable; however, eVestment does not guarantee or warrant the accuracy, timeliness, or completeness of the information provided and is not responsible for any errors or omissions. Performance results may be provided with additional disclosures available on eVestments systems and other important considerations such as fees that may be applicable. Not for general distribution. All categories not necessarily included. Copyright 2013-2025 eVestment Alliance, LLC. All Rights Reserved.

Excess returns and competitive rankings presented are based on composites, calculated as an asset-weighted average return of similarly-managed individual portfolios. Excess return is calculated as the difference between the performance returns of the investment strategy composite and the respective benchmark return over the measurement period presented, and is annualized for periods greater than 1 year. Information Ratio is defined as the Excess Return divided by Tracking Error over the measurement period presented. Returns are presented before the deduction of management fees and will be reduced by advisory fees incurred in the management of the portfolio. For a description of advisory fees, please see Form ADV, Part II. For additional performance information, please refer to the fully-compliant presentation, which must accompany or precede this material.

Principal Risks

The principal risks are generally those attributable to stock investing. Holdings are subject to market, issuer and other risks, and their values may fluctuate. Market risk is the risk that securities may decline in value due to factors affecting the securities markets or particular industries. Issuer risk is the risk that the value of a security may decline for reasons specific to the issuer, such as changes in its financial condition.

Foreign investments could be riskier than U.S. investments because of exchange rate, political, economic, liquidity and regulatory risks. Additionally, investments in emerging market countries are riskier than other foreign investments because the political and economic systems in emerging market countries are less stable.

Various strategies mentioned in this document employ a quantitative model to execute the strategy. Data imprecision, software or other technology malfunctions, programming inaccuracies and similar circumstances may impair the performance of these systems, which may negatively affect performance. Furthermore, there can be no assurance that the quantitative models used in managing the strategy will perform as anticipated or enable the strategy to achieve its objective.

Artificial intelligence (AI) may pose inherent risks, including but not limited to: issues with data privacy, intellectual property, consumer protection, and anti-discrimination laws; ethics and transparency concerns; information security issues; the potential for unfair bias and discrimination; quality and accuracy of inputs and outputs; technical failures and potential misuse. Users of AI-based technology and tools should take these risks into consideration prior to use of the technology.

The Composite performance information represents the investment results of a group of fully discretionary accounts managed with the investment objective of outperforming the benchmark.

Not FDIC Insured | May Lose Value | No Bank Guarantee | Not a Deposit

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