



## The scientific pursuit of *a better way to invest*

*If you are a retail investor in the UK, Ireland, Germany or the Netherlands, this document has been provided to you by your financial adviser, who can help explain its contents.*

Dimensional at a Glance\*

43

YEARS SINCE  
FOUNDING

\$740B

FIRMWIDE ASSETS  
UNDER MANAGEMENT

1,500+

EMPLOYEES IN  
15 GLOBAL OFFICES

5

NOBEL LAUREATES  
ASSOCIATED WITH THE FIRM

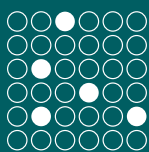
One

INVESTMENT  
PHILOSOPHY

A Different Way to Invest

STOCK PICKERS

Try to outguess the market



Find pricing "mistakes"

INDEXERS

Track the market



Match the returns of an index

DIMENSIONAL

Trust the market



Use market data and a systematic approach  
to target higher expected returns

A Foundation Built on Academic Research

*"At Dimensional, we don't jump on every new idea that comes along. We're looking for what will stand up over a long period of time."*

EUGENE FAMA

Nobel laureate, 2013  
Professor, University of Chicago  
Dimensional Director and Consultant

*"Our goal is to inform, not justify, how Dimensional uses the research that we and other academics have discovered."*

KENNETH FRENCH

Professor, Dartmouth College  
Dimensional Director, Consultant, and  
Co-Chair of the Investment Research Committee

*"It's 10% having a good idea and 90% implementing that idea and making it work. Dimensional has been making it work for decades."*

ROBERT MERTON

Nobel laureate, 1997  
Professor, MIT  
Dimensional Resident Scientist

\*Firmwide assets under management in USD (billions), number of employees and offices as at 30 June 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 emphasise 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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Robert Merton provides consulting services to Dimensional Fund Advisors LP in his capacity as Resident Scientist of Dimensional Holdings Inc. Eugene Fama and Ken French are members of the Board of Directors of the general partner of, and provide consulting services to, Dimensional Fund Advisors LP.

#### RISKS

**Investments involve risks. The investment return and principal value of an investment may fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original value. Past performance is not a guarantee of future results. There is no guarantee strategies will be successful.**

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