

## Oak Ridge Investments Expands Product Lineup with Three New Funds

*Firm targets asset growth through strategic product launches*

**CHICAGO – August 18, 2016:** Oak Ridge Investments, LLC is pleased to announce the launch of three new products by leveraging its specialized investment capabilities. The firm continues to address client demand by diversifying its mutual fund lineup with new strategies which will drive additional asset growth.

The Oak Ridge Disciplined Growth Fund (ODGIX) invests in U.S. companies growing at above average rates across the market cap range. This fund follows the long-running, fundamentally driven 15 year track record of the Oak Ridge All Cap Growth strategy managed by Robert McVicker. The investment objective of the fund seeks long-term growth of capital, in pursuing its objective the fund aims to outperform the Russell 3000 Growth Index.

The Oak Ridge Technology Insights Fund (ORTHX) invests in a universe of innovative companies benefiting from the use or application of technology. Portfolio managers Robert Corman and Terence Quinn will use their specialized focus to invest in companies driving market share gains which should lead to sustained earnings growth. The investment objective of the fund is long-term growth of capital, and seeks to outperform the S&P North American Technology Index.

The Oak Ridge Global Equity Fund (OGESX) is sub-advised by Algert Global, LLC. This global strategy focuses on analyzing inefficiencies in developed equity markets that result from investor behavioral biases and will be benchmarked against the MSCI World Index. The fund's investment objective is to seek long-term capital appreciation. Through a systematic process, the fund aims to invest in companies with solid fundamentals, attractive relative valuations, and measureable market catalysts.

Algert Global currently sub-advises two other Oak Ridge strategies, the Oak Ridge International Small Cap Fund (ORIIX) and Oak Ridge Dynamic Small Cap Fund (ORSIX).

"We believe the new Funds address a client-driven need in the marketplace by providing exposure to specialized investment segments," says Oak Ridge's Chief Operating Officer, Mark Goodwin. "We expect continued AUM growth in our strategies, through lift-outs, acquisitions and with sub-advisory partnerships. New products will be instrumental in achieving these objectives."

"The uniqueness of the funds' asset classes is a timely and compelling opportunity for our clients," adds Head of Distribution & Marketing, Philip Callahan. "These complementary strategies will deepen the Oak Ridge suite of diversified investment capabilities. Launching three new funds based on the established experience of the funds' portfolio managers is a huge advantage."

Oak Ridge Disciplined Growth Fund – Class A: ORDGX / Class I: ODGIX  
Oak Ridge Technology Insights Fund – Class A: ORTAX / Class I: ORTHX  
Oak Ridge Global Equity Fund – Class A: ORGEX / Class I: OGESX

### **ABOUT OAK RIDGE INVESTMENTS:**

Oak Ridge Investments is an investment management firm located in Chicago and New York. Founded in 1989, Oak Ridge is focused on providing select, actively managed equity strategies to its broad range of clients. The firm currently manages more than \$4 billion in assets.

### **CONTACT:**

www.oakridgeinvest.com  
Philip J. Callahan, Head of Distribution & Marketing  
p: 312-857-7034 | pcallahan@oakridgeinvest.com

**Past performance does not guarantee future results. Before investing you should carefully consider the Fund's investment objectives, risks, charges and expenses. This and other information is in the prospectus, a copy of which may be obtained by calling 855-551-5521 or visiting oakridgeinvest.com. Please read the prospectus carefully before you invest.**

Important Risks: Equity securities, such as common stocks, are subject to market, economic and business risks that may cause their prices to fluctuate. Investments made in small capitalization companies may be more volatile and less liquid due to limited resources or product lines and more sensitive to economic factors. The Funds may invest in foreign securities which involves certain risks such as currency volatility, political and social instability and reduced market liquidity. Emerging markets may be more volatile and less liquid than more developed markets and therefore may involve greater risks. The Funds may invest in ETFs (Exchange-Traded Funds) and is therefore subject to the same risks as the underlying securities in which the ETF invests as well as entails higher expenses than if invested into the underlying ETF directly. \*A shares are not yet available for purchase, I shares are not currently registered in all states. Distributed by IMST Distributors, LLC



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