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Media Contact: Hibre Teklemariam
SunStar Strategic
hteklemariam@sunstarstrategic.com
703-894-1057

Summit Global Investments Launches the SGI U.S. Large Cap Core ETF on NYSE Arca

SGLC offers a risk managed approach to investing

Bountiful, Utah — March 30, 2023— Summit Global Investments (SGI) announced the launch of SGI U.S. Large Cap Core ETF one of two new ETFs. Shares for the new ETF will begin trading on NYSE Arca today, ticker symbol SGCL.

SGLC is actively managed. It is a semi-transparent ETF, one of a breed of the newer semi-transparent exchange traded funds developed in 2019 as part of the evolution of the ETF space. Unlike traditional ETFs, trades and decisions are not shared daily, in our view this minimizes the potential for other traders to engage in practices that may potentially harm the fund and its shareholders.

This ETF is different from traditional ETFs. Traditional ETFs tell the public what assets they hold each day. This ETF will not. This may create additional risks for your investment. For example: You may have to pay more money to trade an ETF's shares. This ETF will provide less information to traders, who tend to charge more for trades when they have less information. The price you pay to buy ETF shares on an exchange may not match the value of the ETF's portfolio. The same is true when you sell shares. These price differences may be greater for this ETF compared to other ETFs because this ETF provides less information to traders. These additional risks may be even greater in bad or uncertain market conditions. The Fund will publish on its website each day a "Proxy Portfolio" designed to help trading in shares of the ETF. While the Proxy Portfolio includes some of the ETF's holdings, it is not the ETF's actual portfolio. The differences between this ETF and other ETFs may also have advantages. By keeping certain information about an ETF portfolio secret, this ETF may face less risk that other traders can predict or copy its investment strategy. This may improve the ETF's performance. If other traders are able to copy or predict an ETF's investment strategy, however, this may hurt the ETF's performance. For additional information regarding the unique attributes and risks of this ETF, see the Prospectus.

“We’re very excited to be on the forefront of this newer genre of ETFs,” said Dave Harden, CEO, Summit Global Investments. “Our proprietary investment process is governed by what we’ve named a Managed Risk Approach.[™] We believe that our investors will benefit from the features of the semi-transparent vehicle, allowing us to potentially deliver attractive risk-managed returns.”

SGLC is designed to be a core holding in an overall investment program. “We believe using SGLC in this way has the potential to help investors achieve market exposure, while providing cross-correlation diversification, competitive returns, and fundamental downside risk management.”

“We are pleased to welcome Summit Global Investments’ U.S. Large Cap Core ETF to NYSE Arca. The NYSE has been a pioneer in the development and support of actively managed ETFs. We are excited that SGI has chosen the NYSE’s Active Proxy Structure for its new ETF. The structure provides a manager like SGI with added flexibility and the potential for some protection to deliver their investment strategies,” said Douglas Yones, Head of Exchange Traded Products at the NYSE.

The new SGI Large Cap Core ETF may help manage the risks found in investor portfolios and in today's fast paced and ever-changing market. Like all ETFs, SGLC offers daily liquidity, is tax-efficient and has competitive expenses. Shares may be purchased through online brokers and financial advisors.

SGLC is a part of the RBB series trust. The RBB Fund, Inc. and The RBB Fund Trust together are a turnkey ETF and mutual fund solution that permits an investment adviser to focus on its core competency of asset management and shifts most responsibility for the establishment, servicing, and corporate governance of funds to RBB.

“We are thrilled to work with Summit on their latest endeavor,” said RBB’s President & CEO, Steven Plump. “They’ve been wonderful partners and we will continue to streamline the governance, so they can focus on seeking to deliver the best risk adjusted returns for their clients.”

About Summit Global Investments

Headquartered in Bountiful, Utah, SGI adheres to a disciplined, managed-risk, multi-factor investment process designed to find attractive investment opportunities. The firm manages multiple investment strategies for its clients. Over a full market cycle, their defensive strategies have historically limited downside risks and allowed for participation in market rallies. SGI’s mission is clear – to help investors win. They care about return and deeply care about the risk associated with such returns. Ever mindful of the impact on their clients’ assets, the combination of Risk, Return and Impact is at the center of their “Managed Risk Approach.” [™]

SGI’s “Managed Risk Approach” has evolved over decades of research and continuous revisions to understand and exploit what reduces risk, avoids pitfalls and elevated idiosyncratic risks, and drives market returns.

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Investors should consider the investment objectives, risks, charges and expenses carefully before investing. For a prospectus or summary prospectus with this and other information about the Fund, please call (800)531-5142 or visit our website at www.sgi.com. Read the prospectus or summary prospectus carefully before investing.

Investing involves risk, including possible loss of principal. The Fund is a newly organized, diversified management investment company with no operating history. The goal of the Proxy Portfolio is, during all market conditions, to track closely the daily performance of the Actual Portfolio and minimize intra-day misalignment between the performance of the Proxy Portfolio and the performance of the Actual Portfolio. The Proxy Portfolio is designed to reflect the economic exposures and the risk characteristics of the Actual Portfolio on any given trading day. Securities traded on over-the-counter ("OTC") markets are not listed and traded on an organized exchange such as the New York Stock Exchange ("NYSE"). Generally, the volume of trading in an unlisted or OTC common stock is less than the volume of trading in an exchange-listed stock. As a result, the market liquidity of some stocks in which the Fund invests may not be as great as that of exchange-listed stocks and, if the Fund were to dispose of such stocks, the Fund may have to offer the shares at a discount from recent prices or sell the shares in small lots over an extended period of time. In addition, penny stocks and pink sheet stocks can be classified as OTC stocks. Securities that can be converted into common stock, such as certain securities and preferred stock, are subject to the usual risks associated with fixed income investments, such as interest rate risk and credit risk.

NYSE Arca is an electronic securities exchange in the U.S. on which [exchange-traded products](#) (ETPs) and equities are listed. The exchange specializes in ETP listings, which include exchange-traded funds (ETFs), exchange-traded notes (ETNs), and exchange-traded vehicles (ETVs).

The SGI Dynamic Tactical ETF is distributed by Quasar Distributors, LLC