

# Scorecard



Investment Manager

Fund Name

As of date

Wasatch Global Investors

Wasatch Global Value

2025-09-30

	1 Year		4 Years		7 Years		10 Years	
	Annualized	QT	Annualized	QT	Annualized	QT	Annualized	QT
Annualized ROR	23.25	1	15.16	1	12.20	2	N/A	
Benchmark	19.81		13.67		12.77		12.47	
Value Added	+3.44		+1.49		-0.56		+0.00	

	2025-09-30		2024-09-30		2023-09-30		2022-09-30	
	Annual ROR	QT	Annual ROR	QT	Annual ROR	QT	Annual ROR	QT
Annual ROR	23.25	1	23.90	4	15.81	3	-0.55	1
Benchmark	19.81		31.97		19.72		-11.81	
Value Added	+3.44		-8.07		-3.91		+11.26	

	1 Year	QT	4 Years	QT	7 Years	QT	10 Years	QT
Standard Deviation	10.19	2	10.91	1	13.19	2	N/A	
Information Ratio	0.00	2	-0.19	1	0.17	2	0.53	
Sharpe Ratio	1.97	1	1.09	1	0.76	2	N/A	
Up Capture	79.47	3	72.04	3	75.74	3		
Down Capture	12.10	1	40.15	1	63.27	2		

Asset Class: Equities. Region: Global. Category: All Cap, Mid Cap, Mid Large Cap, Large Cap.

Benchmark: iShares MSCI World Index ETF

Number of Products in Peer Group: 319

1st Quartile	Top 25%
2nd Quartile	Above Average
3rd Quartile	Below Average
4th Quartile	Bottom 25%

Positive Value Added

Negative Value Added

outperformance compared to the benchmark

underperformance compared to the benchmark