

Innovation at every level.



Decades of innovation powering award-winning investor outcomes.

For more than 40 years, SEI has continuously evolved its investment approach, combining research, technology, and partnership to help advisers navigate change with confidence and achieve better investor outcomes.

This timeline highlights the milestones that have shaped our philosophy and continue to define how we innovate today.

Strategy-level innovations

Managed volatility

Co-developed and launched the market's first managed (low) volatility strategy to provide equity exposure for cautious investors

Dynamic allocation

Launched dynamic asset and factor allocation strategies to implement tactical tilts with greater precision while reducing transaction and tax costs for investors

Liquid alternatives

Seeded DBI to launch liquid alternatives solution to address the challenge of absolute return

ESG risk optimisation

ESG risk optimisation approach delivers Article 8 equity funds without detracting from returns

1980s



Strategic asset allocation

SEI employee Gil Beebower co-authors a groundbreaking paper identifying the importance of asset allocation in determining portfolio performance¹

1990s



Manager of managers

SEI pioneers segregated mandate approach to enhance access, risk control, and cost efficiency of multi-manager investing versus fund-of-funds investing

2000s



Goals-based investing

SEI employee Dan Nevins integrates traditional with behavioural financial theories into portfolio construction to prompt better investor decision-making and improve the likelihood of achieving real-world objectives²

2010s



Alpha sources

SEI research identifies majority of returns are driven by manager style, making style—not past performance—a more effective means of selecting managers

2020s



Optimal portfolios

SEI identifies the optimal blend of quant and fundamental managers for return, risk, and cost³

The award-winning SEI Balanced Fund.

5 Asset Classes																	
Equity 62.30%								Fixed Income 25.95%					Inflation Sensitive 7.50%		Absolute Return* 4.00%	Cash and Cash Equivalents 0.25%	
17 Sub-Asset Classes																	
Global Managed Volatility 5.00%	Select Momentum 10.92%	Select Value 10.92%	Select Quality 5.46%	Small Cap Select 8.58%	Emerging Markets 6.32%	Dynamic Asset Allocation 6.90%	Dynamic Factor Allocation 8.20%	UK Core 3.10%	High Yield 5.40%	Global Opportunistic 6.45%	Global Government 5.60%	Emerging Markets 5.40%	Inflation Linked Bonds 4.50%	Commodities 3.00%	Liquid Alternatives 4.00%	Sterling Liquidity 0.25%	
45 Investment Mandates																	
SEI QiM	SEI QiM	SEI QiM	SEI QiM	SEI QiM	SEI QiM	SEI QiM	SEI QiM	M&G	Ares	Ardea	Ardea	Artisan	SEI	Columbia Threadneedle	Dynamic Beta Investments	Blackrock	
LSV	Alphinity	Brickwood	Pinestone	Easterly	Aikya	State Street		Royal London	Brigade	RBC BlueBay	Brandywine	Colchester					
Acadian		Tocqueville	Lazard	Geneva	JOHCM				Benefit Street	Schroders	Colchester	Grantham Mayo					
					Robeco				Blackstone	Wellington	Insight	Invesco					
									J.P. Morgan			Marathon					
Over 11,000 Holdings																	
667	219	362	221	962	334	1353	217	392	1797	2027	835	1758	33	89	63		

LSEG



Lipper
Fund Awards

Winner 2026
United Kingdom

Award received for consistently strong risk-adjusted performance over 10-years compared to 166 funds in the Mixed Asset Balanced Category.

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¹ Gary P. Brinson, L. Randolph Hood, and Gilbert L. Beebower, "Determinants of Portfolio Performance," Financial Analysts Journal, July–August 1986, Vol. 42, No. 4, pp. 39–44.

² Journal of Wealth Management, Spring 2004, Vol. 6, No. 4, pp. 8–23.

³ E. Barbanera and V. Shang, "Optimal Portfolios in the Presence of Predictable Returns," 2023.



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ABOUT SEI

SEI® (NASDAQ:SEIC) is a leading global provider of financial technology, operations, and asset management services within the financial services industry. SEI tailors its solutions and services to help clients more effectively deploy their capital—whether that's money, time, or talent—so they can better serve their clients and achieve their growth objectives.

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