

Composite List

Active Composites	Benchmark	Description
Concentrated Small Cap Equity	Russell 2000® Index	Uses a core style of equity portfolio management with a market cap range similar to the Russell 2000® Index and with no minimum account size. The composite was created October 1, 2008.
Focused Small Cap Growth Equity	Russell 2000® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2000® Growth Index with no minimum account size. Prior to September 30, 2008 the account minimum size for the composite was \$1 million. The composite was created April 1, 2002.
Focused Small Cap Value Equity	Russell 2000® Value Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell 2000® Value Index with no minimum account size. Prior to September 30, 2008 the account minimum size for the composite was \$1 million. The composite was created July 1, 2008.
Large Cap Core Equity	S&P 500 Index	Uses a core style of equity portfolio management with a market cap range similar to the S&P 500 with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$250,000. The composite was created July 1, 2000. (Formerly known as Disciplined Large Cap Core).
Large Cap Value Equity	Russell 1000® Value Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell 1000® Value with no minimum account size. Prior to September 30, 2008, the minimum account size for the composite was \$1 million. The composite was created July 1, 2000. (Formerly known as Disciplined Large Cap Value).
Micro Cap Core Equity	Russell Microcap® Index	Uses a core style of equity portfolio management with a market cap range similar to the Russell Micro Cap® Index with no minimum account size. The composite was created in January 1, 2008.
Micro Cap Equity	Russell Microcap® Growth Index	Focuses on emerging companies with a market cap range similar to the Russell Microcap® Index with no minimum account size. Prior to September 30, 2008 the account minimum size for the composite was \$1 million. The composite was created in April 1, 2002. (Formerly known as Micro Cap Growth Equity).
Micro Cap Value Equity	Russell Microcap® Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell Microcap® Index with no minimum account size. The composite was created in January 1, 2008.
Mid Cap Growth Equity	Russell Midcap® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell Midcap® Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The composite was created April 1, 2002.
Small Cap Core Equity	Russell 2000®	Uses a core style of equity portfolio management with a market cap range similar to the Russell 2000® Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The Composite was created January 1, 2008.
Small Cap Growth Equity	Russell 2000® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2000® Growth Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The composite was created April 1, 2002.
Small Cap Growth Wrap	Russell 2000® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2000 Growth Index with a minimum account size of \$90,000. The Composite was created November 1, 2005.
Small Cap Value Equity	Russell 2000® Value Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell 2000 with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The composite was created January 1, 2000.
Small Cap Value DB	Russell 2000® Value Index	Uses a value style of equity portfolio management that direct brokerage with a market cap range similar to the Russell 2000 Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. A separate composite is used for those small cap growth clients with 100% Directed Brokerage requirements. The composite was created July 1, 2006.
Smid Cap Growth Equity	Russell 2500® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2500® Growth Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The Composite was created March 1, 2004.
Smid Cap Value Equity	Russell 2500® Value Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell 2500® Value Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The composite was created January 1, 2000. (formerly known as Extended Small Cap Value).
Smid Growth Restricted	Russell 2500® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2500® Growth Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. A separate composite is used for those small cap growth clients with restricted (no healthcare) requirements. The composite was created July 1, 2006. (formerly known as Smid No Healthcare).

Closed Composites

Small Cap Growth Northern Trust Wealth Advisors	Russell 2000® Growth Index	Includes NTWA Small Cap Growth accounts. The composite was created November 1, 2005 and closed August 15, 2007.
Smid Cap Growth DB	Russell 2500® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2500® Growth Index and a minimum account size of \$1 million. A separate composite is used for those smid cap growth clients with 100% Directed Brokerage requirements. The composite was created December 1, 2006 and closed May 1, 2008.
Small Cap Growth DB	Russell 2000® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2000® Growth Index with a minimum account size of \$1 million. A separate composite is used for those small cap growth clients with 100% Directed Brokerage requirements. The Composite was created November 1, 2005 and closed June 1, 2008.
Small Cap Value Wrap	Russell 2500® Value Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell 2500® Value Index. The minimum account size is \$100,000. The composite was created December 1, 2005 and closed June 1, 2008.
Mid Cap Value Equity	Russell Midcap® Value Index	Uses a value style of equity portfolio management with a market cap range similar to the Russell Midcap® Index with no minimum account size. Prior to September 30, 2008 the minimum account size for the composite was \$1,000,000. The composite was created January 1, 2004 and closed May 1, 2009.
Focused Small Cap Growth Directed Brokerage	Russell 2000® Growth Index	Uses a growth style of equity portfolio management that direct brokerage with a market cap range similar to the Russell 2000® Growth Index with a minimum account size of \$100,000. The composite was created June 1, 2002. (Formerly known as Focused Small Cap Growth Wrap). The composite was closed January 1, 2010.
Mid Cap Growth Wrap	Russell Midcap® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell Midcap® Growth Index with a minimum account size of \$90,000. The Composite was created November 1, 2005 and closed January 1, 2010.
Smid Cap Growth Wrap	Russell 2500® Growth Index	Uses a growth style of equity portfolio management with a market cap range similar to the Russell 2500® Growth Index with a minimum account size of \$90,000. The Composite was created October 1, 2005 and closed January 1, 2010.