



# The Oaktree Advantage



OAKTREE

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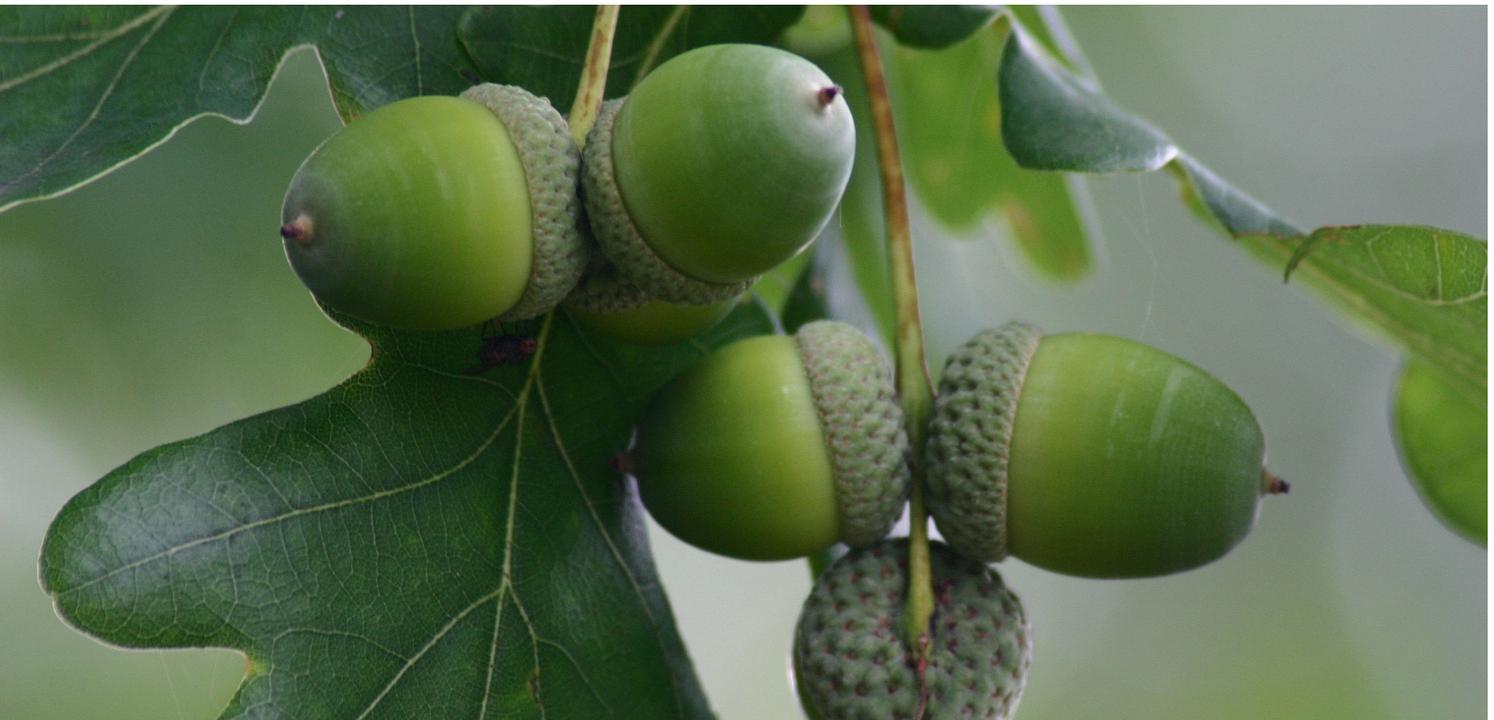
Oaktree Capital Management, L.P. (“Oaktree”) is a leader among global investment managers specializing in alternative investments, with a deep heritage in credit solutions. All investment activities are conducted according to a unifying philosophy that is embraced by our experienced team of specialists focused on delivering competitive investment results with risk under control.

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“Only truly superior skill, discipline and integrity are likely to produce consistently high returns in the long run with limited risk.”

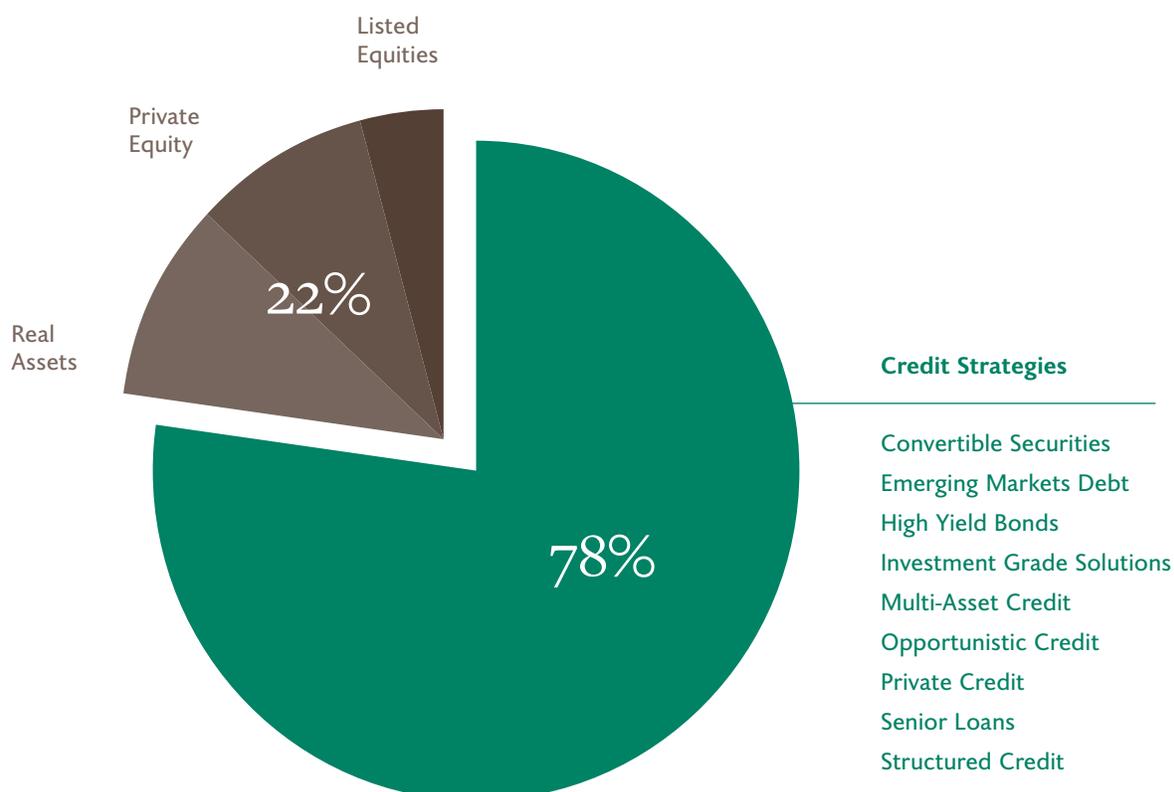


HOWARD MARKS  
CO-CHAIRMAN,  
CO-FOUNDER



# Specialized Credit Strategies

Oaktree has a long history of delivering credit solutions that invest in both liquid and illiquid instruments, sourced directly from borrowers and public markets.



**\$202 Billion**  
Total AUM

**\$143 Billion**  
Credit-Centric

**30+ Years**  
Credit Investing Over  
Multiple Cycles

Firm AUM breakdown shown as of December 31, 2024.  
Source: Oaktree.

# Unifying Investment Philosophy

While varied in investment objective and risk/return profile, each strategy is grounded in Oaktree's unifying investment philosophy that consists of six enduring tenets that have not changed since the firm was founded in 1995.



## Primacy of risk control

If we avoid the losers, the winners take care of themselves



## Benefits of specialization

Our team members' experience and expertise give us a substantial advantage



## Emphasis on consistency

A superior record is best built on a high batting average rather than the hope that great years will outweigh dismal ones



## Macro-forecasting not critical to investing

Superior knowledge of companies and their securities is the best foundation for consistently excellent performance



## Importance of market inefficiency

It is only in less-efficient markets that hard work and skill are likely to produce superior returns



## Disavowal of market timing

The ability to correctly time markets is limited at best; we are fully invested whenever we can find attractive investments

# Experienced Team of Investment Professionals

Established in 1995 by a team that had been investing together since the mid-1980s, the firm has grown to a global team that includes more than 1,200 employees across 23 cities and 17 countries.



214+

Credit Investment Professionals

50

Portfolio Managers

25

Average Years of Experience

As of December 31, 2024.  
Source: Oaktree.

# Our Commitment

Oaktree believes in putting clients' interests ahead of their own and treating all clients equally. Today, clients around the world have entrusted Oaktree with their assets.

**65 of 100**  
Largest U.S. Pension Plans

**550+**  
Corporations Around the World

**40 of 50**  
State Retirement Plans in the U.S.

**300+**  
Endowments and Foundations Globally

**16**  
Sovereign Wealth Funds

Finding opportunities in today's credit markets requires experience and expertise built over time. Contact Brookfield Oaktree Wealth Solutions to learn more about how we can help you meet your portfolio objectives.

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WEALTH SOLUTIONS