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POPLAR FOREST PARTNERS FUND

Established on December 31, 2009 our flagship fund is a U.S. focused, contrarian value fund designed to complement a core portfolio holding for long-term investors. The Fund seeks long-term growth of capital by investing primarily in equity securities of under-appreciated large and medium-sized companies and industries. Poplar Forest Partners is a concentrated portfolio of 25 to 35 stocks built without regard to the market cap or the sector weightings of the S&P 500®.

PARTNERS FUND

POPLAR FOREST CORNERSTONE FUND

Established on December 31, 2014 the Poplar Forest Cornerstone Fund is a balanced fund of U.S. focused equity and debt securities. The Fund may be suitable for long-term investors who seek a combination of both capital growth and preservation with less volatility than would generally be inherent in an all equity account.

CORNERSTONE FUND

ACTIVE SHARE

How can investors know whether a portfolio is active or passive? One metric is called “Active Share.” Active Share measures the degree to which a fund’s portfolio differs from the holdings of its benchmark. The higher the active share number, the more active and independent a portfolio is from its benchmark. An Active Share score of 100, for example, indicates that a fund has perfect independence from its benchmark; an Active Share score of zero indicates that the fund is more like a passive index fund. Active Share is not a predictor of future performance.

ACTIVE SHARE SCORES AS OF JUNE 30, 2019

Poplar Forest Partners Fund	93.9%
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Mutual fund investing involves risk. Principal loss is possible. Investments in the Poplar Forest Funds include risks associated with debt securities, foreign and emerging market securities, fixed income securities, small and medium companies and options. See the prospectus for additional information about the risks of investing in the Funds.

Before you invest in the Poplar Forest Funds, please refer to the [prospectus](#) for important information about the investment company, including investment objectives, risks, charges and expenses. You may also obtain a hard copy of the prospectus by calling 1-877-522-8860. The prospectus should be read carefully before you invest or send money.

The Funds are offered only to United States residents, and information on this site is intended only for such persons. Nothing on this web site should be considered a solicitation to buy or an offer to sell shares of the Fund in any jurisdiction where the offer or solicitation would be unlawful under the securities laws of such jurisdiction.

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Investment Glossary

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