

# News Release

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## CHARLES SCHWAB INVESTMENT MANAGEMENT HONORED WITH FOUR LIPPER FUND AWARDS

**SAN FRANCISCO, March 24, 2017** — Charles Schwab Investment Management, Inc., the asset management arm of The Charles Schwab Corporation, announced that it has received four Best-In-Class Thomson Reuters Lipper Fund Awards. The annual Lipper Fund Awards recognize funds and fund management firms for their consistently strong, risk-adjusted performance relative to their peers.

Lipper honored the following funds on the basis of risk-adjusted returns for the three-, five-, or 10-year periods ending November 30, 2016:

- [Schwab Fundamental International Small Company Index Fund \(SFILX\)](#) was named best-in-class among 66 International Small/Mid-Cap Core Funds for the 3-year period.
- [Laudus Mondrian International Equity Fund, Institutional \(LIEIX\)](#) was named best-in-class among 33 International Large-Cap Value Funds for the 3-year period and among 32 International Large-Cap Value Funds for the 5-year period.
- [Laudus International MarketMasters Fund™, Select \(SWMIX\)](#) was named best-in-class among 206 International Multi-Cap Growth Funds for the 10-year period.

“It’s an honor to be recognized by Lipper for our consistent performance in each of these categories because these awards are a reflection of our commitment to delivering strong investment results over the long-term,” said Marie Chandoha, president and chief executive officer of Charles Schwab Investment Management. “We are dedicated to providing a modern approach to asset management, quality products and a focus on service in order to deliver value to our clients.”

The honor was announced last night at the Lipper Fund Awards ceremony in New York.

### About The Lipper Fund Awards

For more than three decades and in over 20 countries worldwide, the Thomson Reuters Lipper Fund Awards have honored funds and fund management firms that have excelled in providing consistently strong, risk-adjusted performance relative to their peers.

Renowned fund data and proprietary methodology is the foundation of the award qualification. Individual classifications of three-, five-, and ten-year periods, as well as fund families with high average scores for the three-year period are recognized.

The highly respected Lipper Fund Awards are part of the Thomson Reuters Awards for Excellence. For more information, please [markets.awards@thomsonreuters.com](mailto:markets.awards@thomsonreuters.com) or visit <http://www.lipperfundawards.com>.

### About Charles Schwab Investment Management

Founded in 1989, Charles Schwab Investment Management, Inc., a subsidiary of The Charles Schwab

Corporation, is one of the nation's largest asset management companies, with more than \$300B in assets under management as of 12/31/16. It is among the country's largest money market fund managers based on assets under management according to iMoneyNet as of 12/31/16. It is also the third-largest provider of index mutual funds and the fifth largest provider of ETFs.\*

More information is available at [csimfunds.com](http://csimfunds.com).

\*Source: Strategic Insight, as of 12/31/16; based on assets under management

### **About Schwab**

At Schwab we believe in the power of investing to help individuals create a better tomorrow. We have a history of challenging the status quo in our industry, innovating in ways that benefit investors and the advisors and employers who serve them, and championing our clients' goals with passion and integrity.

More information is available at [www.aboutschwab.com](http://www.aboutschwab.com). Follow us on [Twitter](#), [Facebook](#), [YouTube](#) and [LinkedIn](#).

### **DISCLOSURES:**

**Investors should consider carefully information contained in the prospectus, or if available, the summary prospectus, including investment objectives, risks, charges, and expenses. You can view and download a prospectus by visiting [csimfunds.com/prospectus](http://csimfunds.com/prospectus). Please read the prospectus carefully before investing.**

**Performance data quoted represents past performance and is no guarantee of future results. Investment returns and principal value will fluctuate so that an investor's shares, when sold or redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than performance data quoted. To obtain performance information current to the most recent month end, please visit [www.csimfunds.com](http://www.csimfunds.com). Performance data quoted does not reflect the non-recurring redemption fee of 2% that may be charged if shares are sold or exchanged within 30 days of the purchase date. If these fees were reflected, the performance data quoted would be lower.**

**Investment value will fluctuate, and shares, when redeemed, may be worth more or less than their original cost.**

Lipper Leaders fund ratings do not constitute and are not intended to constitute investment advice or an offer to sell or the solicitation of an offer to buy any security of any entity in any jurisdiction. As a result, you should not make an investment decision on the basis of this information. Rather, you should use the Lipper ratings for informational purposes only. Certain information provided by Lipper may relate to securities that may not be offered, sold or delivered within the United States (or any State thereof) or to, or for the account or benefit of, United States persons. Lipper is not responsible for the accuracy, reliability or completeness of the information that you obtain from Lipper. In addition, Lipper will not be liable for any loss or damage resulting from information obtained from Lipper or any of its affiliates.

Distinction does not imply a guarantee of future results. Distinction does not necessarily imply that the fund had the best performance within its category. There are numerous Lipper Leaders in every category.

International investments involve additional risks, which include differences in financial accounting standards, currency fluctuations, geopolitical risk, foreign taxes and regulations, and the potential for illiquid markets. Investing in emerging markets may accentuate these risks.

Small cap funds are subject to greater volatility than those in other asset categories.

The Laudus Group® of Funds includes the Laudus U.S. Large Cap Growth Fund and Laudus Mondrian Funds, which are part of the Laudus Trust and distributed by ALPS Distributors, Inc. ALPS Distributors, Inc. and Charles Schwab & Co., Inc. are unaffiliated entities.

Charles Schwab Investment Management, Inc. (CSIM), the investment advisor for Schwab Funds, and Charles Schwab & Co., Inc. (Schwab), Member SIPC, the distributor for Schwab Funds, are separate but affiliated companies and subsidiaries of The Charles Schwab Corporation.

Thomson Reuters Lipper is a nationally recognized organization that ranks the performance of mutual funds within a universe of funds that have similar investment objectives. The fund award rankings are historical and are based on risk-adjusted total return with capital gains and dividends reinvested.

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