

## Federated Hermes, Inc. launches active large-cap growth fund for qualified retirement plan investors

- **Transparent and repeatable investment process tested in multiple market conditions, now available as a collective investment fund (CIT)**

(PITTSBURGH, Pa., Jan. 28, 2026) — Federated Hermes, Inc. (NYSE: FHI), a global leader in active investment management, today announced the launch of the [Federated Hermes MDT Large Cap Growth Collective Investment Fund](#), a collective investment fund (CIT) that pursues long-term capital appreciation by investing primarily in common stock of large-sized U.S. companies.

Federated MDTA LLC (Federated Hermes MDT) has been managing [large-cap growth strategies](#) since 2004, with \$5.2 billion in large-cap growth assets under management as of Sept. 30, 2025 across its mutual funds, exchange-traded funds (ETF), institutional separate accounts and separately managed accounts (SMAs). Similar to the investment strategy followed by the mutual fund, [Federated Hermes MDT Large Cap Growth Fund](#), the CIT leverages a bottom-up, systematic approach, designed to be objective and remove human bias from the stock-selection process.<sup>1</sup>

The fund's trustee is Great Gray Trust Company, LLC (Great Gray), a leading provider of CITs to the retirement plan market. Great Gray offers retirement plan investors access to Federated Hermes MDT's proprietary, data-driven quantitative approach through the new Federated Hermes MDT Large Cap Growth Collective Investment Fund as well as the [Federated Hermes MDT Mid Cap Growth Collective Investment Fund](#) and [Federated Hermes MDT Small Cap Core Collective Investment Fund](#).

"Federated Hermes MDT's ability to seek alpha from multiple sources differentiates this CIT from many other growth strategies," said Bryan Burke, director of strategic solutions at Federated Hermes. "The new large-cap growth CIT offers retirement plan investors an actively managed alternative to an index fund and a diversified complement to a concentrated growth strategy."

[Federated Hermes MDT](#), an early practitioner of quantitative investing, employs a collaborative approach to manage its strategies using the same quantitative investment process. The CIT's key investment team includes Daniel Mahr, CFA, head of the Federated Hermes MDT investment team; Damien Zhang, CFA, head of Federated Hermes MDT research; Frederick L. Konopka, CFA, portfolio and trading manager; and John Paul Lewicke, research manager.

Federated Hermes advises a [suite of CITs](#) that fit a variety of retirement plan needs. With more than \$4.1 billion CIT assets under management, Federated Hermes continues to strategically introduce complementary offerings of our most popular investment strategies—in this case, a cost-efficient, actively managed growth strategy for qualified retirement plan investors.

Federated Hermes, Inc. is a global leader in active investment management, with \$871.2 billion in assets under management, as of Sept. 30, 2025. We deliver investment solutions that help

investors target a broad range of outcomes and provide equity, fixed-income, alternative/private markets, multi-asset and liquidity management strategies to more than 10,000 institutions and intermediaries worldwide. Our clients include corporations, government entities, insurance companies, foundations and endowments, banks and broker/dealers. Headquartered in Pittsburgh, Federated Hermes has more than 2,000 employees in London, New York, Boston and offices worldwide. For more information, visit [FederatedHermes.com/us](http://FederatedHermes.com/us).

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<sup>1</sup>Key Comparisons between CITs and Mutual Funds: CITs are tax-qualified investments primarily restricted to the retirement market (i.e., not available to the general public) so investors tend to have a longer-term horizon, and the trustee can make investment decisions without tax considerations. Mutual funds are not subject to these investor limits or investment horizons and must distribute substantially all of their taxable net gains and income to investors. CIT expense structures can be customized to investor channels. Mutual funds generally have less fee flexibility. CITs tend to have lower administrative, marketing and distribution costs than mutual funds due to the differences in how they can be sold and to whom. CITs are maintained by a bank as trustee and are subject to federal or state banking regulation and ERISA fiduciary standards. Mutual funds are managed by registered investment advisers and are subject to extensive SEC regulation and public disclosure and reporting requirements. Both CITs and mutual funds are generally priced and traded daily, subject to annual financial audits, and benefit from their pooled structure that aggregates investor funds and can provide greater diversification than individual accounts.

Great Gray Trust Company, LLC serves as Trustee for its bank CITs and maintains ultimate fiduciary authority over the management of, and investments made in, the CITs. Federated Hermes MDT has been hired by the Trustee to assist it in managing certain of its CITs. The CITs are not mutual funds as the CITs and their units are exempt from registration under the Investment Company Act of 1940 and the Securities Act of 1933, respectively.

**Investments in the CITs are not bank deposits or obligations of and are not insured or guaranteed by Great Gray Trust Company, LLC, any bank, the FDIC, the Federal Reserve, or any other governmental agency. The CITs are commingled investment vehicles, and as such, the values of the underlying investments will rise and fall according to market activity; it is possible to lose money by investing in the CITs.**

Participation in CITs is limited primarily to qualified retirement plans and certain state or local government plans and is not available to IRAs, non-governmental health and welfare plans and, in certain cases, Keogh (H.R. 10) plans. CITs may be suitable investments for plan fiduciaries seeking to construct a well-diversified retirement savings program. Investors should consider the investment objectives, risks, charges, and expenses of any pooled investment fund carefully before investing. The Additional Fund Information and Principal Risk Definitions (PRD) contains this and other information about a CIT and is available at [www.greatgray.com/principalriskdefinitions](http://www.greatgray.com/principalriskdefinitions) or ask for a free copy by contacting Great Gray Trust Company, LLC at (866) 427-6885.

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CITs are subject to risks and fluctuate in value.

The quantitative models and analysis used by Federated Hermes MDT may perform differently than expected and may affect fund performance.

The value of equity securities in the fund's portfolio will fluctuate and, as a result, the fund's share price may decline. Equity securities may decline in value because of an increase in interest rates or changes in the stock market.

Federated Hermes MDT Large Cap Growth Fund is a "Diversified" investment, while Federated Hermes MDT Large Cap Growth Collective Investment Fund is not. For more information, see the respective governing documents.

Diversification does not assure a profit nor protect against loss.

Past performance is no guarantee of future results.

Alpha is a measure of how much or how little return is generated, given the risk a portfolio takes.