WisdomTree Celebrates 1-Year Anniversary of AGGY: Looking Within the Agg Universe to Enhance Income

AGGY Beat 98% of Its Respective Morningstar Category over a One-Year Period

New York, NY – (GlobeNewswire) – August 29, 2016 – WisdomTree (NASDAQ: WETF), an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager, today announced the one-year anniversary of the WisdomTree Barclays U.S. Aggregate Bond Enhanced Yield ETF (AGGY).1

AGGY Outperformed Popular Active and Passive Strategies

AGGY seeks to track the Barclays U.S. Aggregate Enhanced Yield Index2 which draws from the same universe of securities as the Barclays US Aggregate Index (Agg)3, but increases weights to higher yielding securities in an effort to boost income potential. This yield-enhanced methodology has not only outperformed the market cap-weighted Barclays Aggregate benchmark; its index performance has also beaten the largest actively managed total-return bond ETFs as well.

The Barclays U.S. Aggregate Enhanced Yield Index has returned 7.67% since fund inception and has delivered an additional 120 bps of return compared to the Barclays U.S. Aggregate Index as of 7/31/2016.4 View standardized performance for AGGY here.

“In the current low-interest rate environment, many have begun looking outside the Agg to boost income potential, by dipping into the more speculative sectors of the market. AGGY can provide investors with an opportunity to enhance income from within the investment grade market, while broadly maintaining the traditionally desirable risk characteristics of the Agg,” said Rick Harper, WisdomTree Head of Fixed Income and Currency.

Overweight in Credit and Underweight in Treasuries

In addition to outperforming the most popular market cap-weighted core strategies, AGGY has also beaten 98% of the funds in its respective Morningstar category over the one-year period that ended 7/31/2016. AGGY’s underlying exposures provide insight into the cause of this outperformance. By decreasing allocations to U.S. Treasuries at a time when they may offer little relative value and overweighting exposure to credit, AGGY has tapped into areas of the Agg that may have better risk/return attributes.

“Many investors overlook the potential in re-weighting the components of the Agg to create unique investment solutions. By taking a different approach, AGGY addresses the need for income

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1 The Fund’s gross expense ratio of 0.20% and the net expense ratio of 0.12% reflect a contractual waiver of 0.08% through 12/31/16.
2 On August 24, 2016, Bloomberg announced the completion of the acquisition of the indexing business of Barclays and accordingly the Barclays indexes are being rebranded as the “Bloomberg Barclays” indexes.
3 Barclays U.S. Aggregate Index: Represents the investment-grade, U.S. dollar-denominated, fixed-rate taxable bond market, including Treasuries, government-related and corporate securities, as well as mortgage and asset backed securities.
4 Source: WisdomTree
enhancement while mitigating risk across a variety of market environments. In our view, AGGY can play a critical role within broad-based fixed income portfolios,” added Harper.

Performance is historical and does not guarantee future results. Current performance may be lower or higher than quoted. Investment returns and principal value of an investment will fluctuate so that an investor’s shares, when redeemed, may be worth more or less than their original cost. Performance data for the most recent month-end is available at www.wisdomtree.com.

Investors should carefully consider the investment objectives, risks, charges and expenses of the Fund before investing. To obtain a prospectus containing this and other important information, please call 866.909.WISE (9473) or visit wisdomtree.com. Investors should read the prospectus carefully before investing.

There are risks associated with investing, including possible loss of principal. Fixed income investments are subject to interest rate risk; their value will normally decline as interest rates rise. Fixed income investments are also subject to credit risk, the risk that the issuer of a bond will fail to pay interest and principal in a timely manner, or that negative perceptions of the issuer’s ability to make such payments will cause the price of that bond to decline. Investing in mortgage- and asset-backed securities involves interest rate, credit, valuation, extension and liquidity risks and the risk that payments on the underlying assets are delayed, prepaid, subordinated or defaulted on. Due to the investment strategy of the Fund, it may make higher capital gain distributions than other ETFs. Please read the Fund’s prospectus for specific details regarding the Fund’s risk profile.

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For the one-year period, AGGY ranked 24 out of 1,091 funds in its peer group, US ETF/MF Intermediate-Term Bond.

Rick Harper is a registered representative of Foreside Fund Services, LLC.
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About WisdomTree
WisdomTree Investments, Inc., through its subsidiaries in the U.S., Europe, Japan and Canada (collectively, “WisdomTree”), is an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager headquartered in New York. WisdomTree offers products covering equities, fixed income, currencies, commodities and alternative strategies. WisdomTree currently has approximately $39.5 billion in assets under management globally.

WisdomTree® is the marketing name for WisdomTree Investments, Inc. and its subsidiaries worldwide.

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