

各位

2017年8月16日
Dimensional Japan Ltd.
日本における代表者兼 CEO ジョン R アルカイヤ

親会社の共同 CEO 交代に関するお知らせ

拝啓 時下ますますご清栄のこととお喜び申し上げます。

平素は格別のご支援ご高配を賜り厚く御礼申し上げます。

さて、当社の親会社である米国 Dimensional Fund Advisors LP.は、2017年8月15日付けで、ジェラルド・オリリー (Gerard O'Reilly)が2017年9月下旬より共同 CEO 及び取締役就任することを発表しました。なお、オリリーは、引き続き CIO を務めます。共同 CEO を務めているエデュアルド・レペト (Eduardo Repetto) は退任いたします。

なお、これまで同様、デービッド・ブースは、Dimensional Fund Advisors LP.のエグゼクティブ・チェアマン、デーブ・バトラーは共同 CEO として社業をサポートしてまいります。

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敬具

記

ジェラルド・オリリー 略歴

2004年に Dimensional 入社。2014年より共同 CIO として、Dimensional の実証研究に基づいた運用戦略の設計、開発を統括。学术界と緊密に連携をはかり、お客様のニーズに即した信頼性とコスト効率の高い投資戦略の提供に携わる。

インベストメント・リサーチ・コミッティーの共同議長を務め、シニア・エグゼクティブ及び運用責任者で構成されるインベストメント・コミッティーのメンバー。

カリフォルニア工科大学より航空学の博士号 (PhD) 取得。トリニティ・カレッジ (ダブリン大学) では大学財団の奨学金を受け、高性能計算で修士号、理論物理学で学士号を取得。

デーブ・バトラー 略歴

Dimensional のヘッド・オブ・グローバル・ファイナンシャル・アドバイザー・サービスとして、20 年以上にわたり、手数料ベースのファイナンシャル・アドバイザーと共に働いてきた経験を持つ。1995 年に Dimensional 入社。世界中のリージョナル・ディレクターとクライアント・サービスのチームを率い、ファイナンシャル・アドバイザーに Dimensional の戦略と長期の顧客志向ビジネスを行うためのリソースを提供する。エグゼクティブ・コミッティーのメンバーであり、経営戦略の立案等に貢献。

1998 年 CFA 取得。1986 年、カリフォルニア大学バークレー校でマーケティングとファイナンスの学士号取得後、1990 年に同校で MBA 取得。大学ではバスケットボール選手として、プロバスケットチームのボストン・セルティクスよりドラフト指名を受ける。2011 年には同校のアスレチック殿堂入りし、2014 年にはパシフィック12カンファレンスのバスケットボール栄誉殿堂入りを果たした。ローズ奨学制度の候補者でもあった。

デービッド・ブース 略歴

1981 年 Dimensional Fund Advisors を創業、エグゼクティブ・チェアマン。

現在は米投信協会 (ICI) 理事会の一員で、同執行委員会主要メンバーの一人。2016 年、インスティテューショナル・インベスター誌より、Investment Management Lifetime Achievement 賞受賞。フォーブス誌が選ぶ 40 人の「マネーマスター: 金融の世界で最も影響力を持つ人物」の一人に選出された。2012 年には、インデックス化と小型株投資のパイオニアとしての功績をはじめ、金融理論とリサーチを資産運用の実践に応用した業績と経歴が評価され、Financial Management Association International (FMA)より最優秀金融エグゼクティブ賞を贈られる。米投信オンラインメディア MutualFundWire では、ミューチュアルファンドで「最も影響力のある 100 人」のうちの第 7 位にランクされ、2010 年の InvestmentNews 誌では、金融サービス業界の「実力者 20 人」の一人に選ばれた。

1992 年、Financial Analyst Journal 誌よりグラハム&ドッド賞(スクロール)を受けた、ユージン・F・ファーマ教授との共同論文「Diversification Returns and Asset Management」をはじめ、執筆論文多数。

シカゴ大学ブース・スクール・オブ・ビジネスはブース氏の名前を冠したもので、同校のビジネスアドバイス評議会の終身メンバーも務める。シカゴ大学評議委員会とカンザス大学基金協会、およびニューヨーク近代美術館評議委員会のメンバー。また、シカゴ大学ベッカー・フリードマン・インスティテュートの監督委員会のメンバーの一人。

1971 年シカゴ大学より MBA、カンザス大学より学士号および理学修士号取得。

以上

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Dimensional Japan Ltd.

金融商品取引業者 関東財務局長(金商)第 2683 号

加入協会:一般社団法人日本投資顧問業協会

ORGANIZATIONAL ANNOUNCEMENT

Gerard O'Reilly to become Co-CEO

Eduardo Repetto to leave firm after 17 impactful years

August 15, 2017

Dimensional Fund Advisors LP, based in Austin, Texas, announced today that Gerard O'Reilly will become Co-CEO alongside Dave Butler, Co-CEO and Head of Global Financial Advisor Services. O'Reilly has been with Dimensional since 2004 and is currently the Co-CIO. These changes will be effective the last week of September. O'Reilly will continue as CIO and be added to the parent company's board of directors.

After 17 years with Dimensional, Eduardo Repetto, who has been serving as Co-CEO and Co-CIO, will be leaving Dimensional in September. David Booth continues in his current role as Executive Chairman.

David Booth, Founder and Executive Chairman of Dimensional, said, "Gerard has been a vital member of both our investments and senior management teams over the past 13 years, and I look forward to working with him in this new role. The Co-CEO model has worked well for our clients and the management of our firm over the years and remains the optimal structure for us going forward."

"Eduardo has made tremendous contributions to Dimensional's success and our investment process," Booth continued. "At Dimensional, our investment process is robust and led by a committee, benefiting from the contributions of a broad team. Our integrated process combines great research with careful execution by our portfolio management and trading teams."

"I'm excited to be taking on this role," said Gerard O'Reilly. "Dimensional has applied many of the great ideas in finance to create solutions that really make a difference in the lives of people investing with us. I look forward to building on our strong foundation and working closely with Dave and our clients to help more people advance toward their goals."

Dave Butler, Co-CEO and Head of Global Financial Advisor Services, added, "Dimensional brings together the best minds in modern finance with cutting edge implementation to meet the needs of clients around the world. Gerard has played an instrumental role in evolving and broadening our capabilities as the science has advanced and our clients' needs have progressed. It is a pleasure to work with him and see the impact he's had. Working together in this expanded capacity will help us continue to push our business and solutions forward for clients."

"It has been a remarkable journey at Dimensional" said Eduardo Repetto. "I am thankful to the clients and my fellow employees that have enabled Dimensional to become this magnificent global business—a business based on sound investment ideas and expert implementation. I have been lucky to have had the opportunity to exchange ideas and develop friendships with so many amazing people from around the world."

BIOGRAPHIES

Gerard O'Reilly, PhD

Gerard O'Reilly has been with Dimensional since 2004, serving as Co-CIO since 2014 with responsibility for the design, development, and delivery of research that guides the firm's scientific approach to investing. He has been instrumental in the creation and implementation of investment solutions that meet the needs of Dimensional's global clients.

Gerard has worked closely with clients and led a team of researchers, portfolio managers and traders, to design and manage reliable and cost-effective investment strategies based on sound academic research. Gerard is the co-chair of the firm's investment research committee and a member of its investment committee, which consists of senior executives and investment team leadership that respectively set policy and oversee management of the portfolios and accounts managed by the company.

Prior to joining Dimensional in 2004, O'Reilly obtained his PhD in aeronautics from the California Institute of Technology. He holds a master's of science degree in high performance computing from Trinity College Dublin in his native country of Ireland, where he also received a first class honors degree in theoretical physics and was a recipient of the Foundation Scholarship.

Dave Butler, CFA

Dave Butler joined Dimensional in 1995 and serves as Co-Chief Executive Officer, Head of Global Financial Advisor Services, and is a Director of Dimensional's parent company. Dave is on the firm's executive committee and has been involved with firmwide strategic vision and decision making for many years. He leads a worldwide team of regional directors and client services professionals who apply Dimensional's strategies and resources to provide clients and investors with an outstanding experience.

Dave attended the University of California, Berkeley, earning his BS in marketing and finance in 1986 and an MBA in 1990. He received the CFA designation in 1998. Dave played basketball for Cal and was drafted by the Boston Celtics. In 2011, he was inducted into the Cal Athletics Hall of Fame, and in 2014, he was named to the Pac-12 Basketball Hall of Honor. Dave was also a Rhodes Scholar candidate.

David Booth

David Booth, a founder of Dimensional Fund Advisors in 1981, is the firm's Executive Chairman.

In 2016, he received the Investment Management Lifetime Achievement Award from Institutional Investor magazine, and Forbes ranked David as No. 39 on the magazine's list of the 40 "Money Masters: The Most Powerful People in the Financial World." In 2012, he was awarded the Outstanding Financial Executive Award by the Financial Management Association International for his background and accomplishments in applying financial theory and research to the practical world of asset management, particularly for his pioneering work in indexing and small capitalization investing. MutualFundWire ranks him seventh in its list of the 100 Most Influential People in mutual funds, and in 2010, InvestmentNews named David as one of "The Power 20" in the financial services industry.

David has written numerous articles, including "Diversification Returns and Asset Management" with Eugene F. Fama, which won a Graham and Dodd Award of Excellence from the Financial Analysts Journal in 1992.

The University of Chicago Booth School of Business was named in honor of David, where he also serves as a lifetime member of the school's business advisory council. David serves on the Investment Company Institute's Board of Governors and is an active member of ICI's Executive Committee. David is a member of the board of trustees of the University of Chicago, the University of Kansas Endowment Association, and Museum of Modern Art in New York. He is also on the board of overseers for the Becker Friedman Institute.

David received his MBA from the University of Chicago in 1971. He also holds an MS and a BA from the University of Kansas.

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