

# Vanguard in a Nutshell

## Mexico Edition

Vanguard®

**Our core purpose: To take a stand for all investors, to treat them fairly, and to give them the best chance for investment success**

### A different kind of investment firm

Vanguard is an investment company not quite like any other. Vanguard was founded in the United States in 1975 on a simple but revolutionary idea: that an investment company should manage the funds it offers in the sole interest of its clients. In 1976, Vanguard pioneered the concept of indexing, introducing the first index fund for individual investors in the United States.

Our approach has earned us the trust of millions of investors and allowed us to become one of the world's largest investment management companies, with a presence in Europe, Australia, and Asia as well as the Americas.

### A unique ownership structure

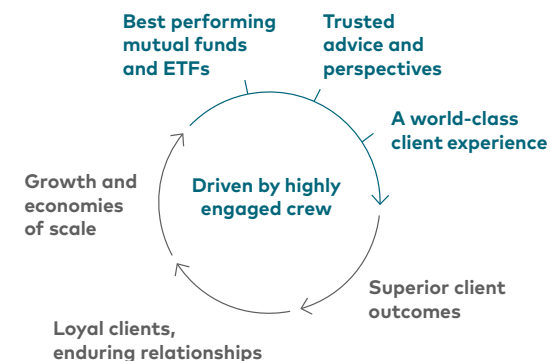
Our client-focused approach is anchored in the ownership structure of The Vanguard Group, Inc., in the United States. Rather than being publicly traded or owned by a small group of individuals, The Vanguard Group is owned by Vanguard's U.S.-domiciled funds and ETFs. Those funds, in turn, are owned by their investors.

### How our ownership structure generates benefits for clients

This unique mutual structure aligns our interests with those of our investors and drives the culture, philosophy and policies throughout the Vanguard organization worldwide. As a result, investors in the Americas benefit from Vanguard's stability and experience, low costs, and client focus.

### How we aim to serve

Vanguard's flywheel: Our aspiration in serving our clients.



# History of Vanguard

- 1975** The Vanguard Group, Inc. begins with 9 actively managed funds
- 1976** The Vanguard Group Inc. introduces the first index mutual fund for individual investors in the U.S. The Fund tracked the S&P500 Index
- 1982** Vanguard started managing DC-pension and education investments
- 1986** Vanguard launches the world's first bond index fund for retail investors in the U.S.
- 1990** Vanguard launches global index funds
- 1996** Vanguard opens its first international business, Vanguard Investments Australia
- 1998** Vanguard Investments Europe opens
- 2006** AUM managed for clients surpasses USD 1 trillion worldwide
- 2009** Vanguard Investments U.K. opens for business
- 2012** Launch of ETFs in Europe
- 2014** Global AUM reaches USD 3 trillion
- 2017** Vanguard Mexico office opens  
Global AUM reaches USD 4 trillion
- 2018** Global AUM reaches USD 5 trillion
- 2019** Global AUM reaches USD 6.2 trillion
- 2020** Vanguard Mexico office becomes the hub to serve Latin American investors

For institutional and sophisticated investors only.  
Not for public distribution.  
Data as of August 31, 2021

## Committed to serving investors in Mexico

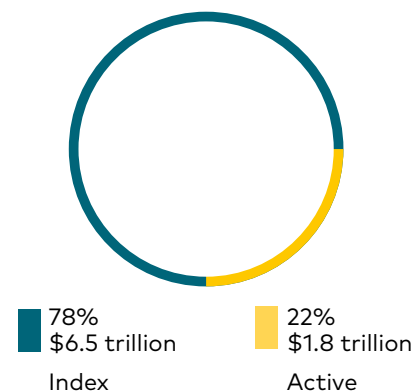
Vanguard has been doing business in Mexico for more than 10 years. In 2017, we opened our first office in Mexico City to better support our clients. In Mexico, Vanguard leverages the scale, experience and resources of its well-established global business. We offer a wide range of equity and fixed income ETFs to investor in Mexico, from both our U.S. and UCITS platforms. And recently adding our first local domiciled ETF: VMEX, Vanguard FTSE BIVA Mexico Equity. We are also a registered investment advisor under Mexico's CNBV, which allows us to offer advice to institutional and independent clients. All benefit from the same robust risk management and low cost of ownership characteristic to Vanguard funds around the world.

## An enduring investment philosophy

All our funds reflect the same principles that have been intrinsic to our company since its inception and are embedded in our culture.

We believe in giving investors simple access to broadly diversified markets at a low cost. The less you pay for investments, the more you get to keep from your potential returns. Combined with Vanguard's worldclass investment infrastructure, dedicated thought leadership, and high quality client service, our investment philosophy stands for highquality funds and exceptional value.

**Total assets worldwide:  
\$8.3 trillion USD**



\*31/08/2021  
Source: Vanguard

**'Low cost isn't a marketing strategy.  
It's Vanguard's investment strategy'**



# Vanguard global presence

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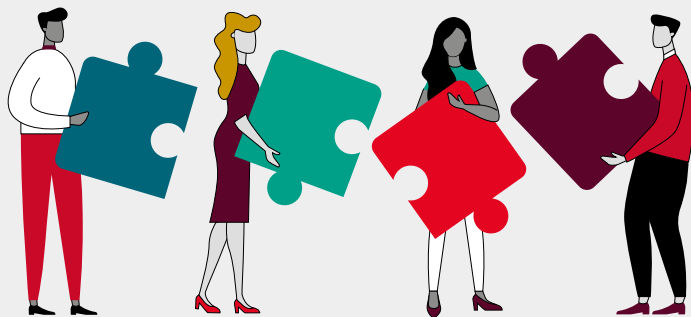
Funds  
worldwide

210

Funds in the  
United States

208

Funds in  
global markets



Data as of August 31, 2021

**Vanguard**

**Connect with Vanguard® > [vanguardmexico.com](https://www.vanguardmexico.com)**  
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