



CAPTRUST Ranked on P&I OCIO Report

Pensions & Investments (P&I) ranked CAPTRUST #5 (\$172 billion) on the 2025 Largest Managers of Full Discretionary Assets list, as part of the annual Investment Outsourcing report. The listing is based on worldwide institutional outsourced assets under management.

We consider these outsourced chief investment officer (OCIO) assets, which encompass endowments, foundations, defined benefit, and defined contribution (DC) plans where CAPTRUST has full discretion over the assets. This was a notable increase from 2024, when CAPTRUST had \$138 billion of OCIO assets (as of March 31, 2024).

The ranking was bolstered by the firm's DC OCIO practice growth. As of March 31, 2025, CAPTRUST oversaw \$153 billion of discretionary DC assets. This ranks the firm first among the P&I's Largest Managers Defined Contribution Managers, based on U.S. institutional outsourced assets under management.

The full rankings can be viewed [here](#) (a subscription may be required).

Disclosure: Pensions & Investments “2025 OCIO Special Report” rankings are based on CAPTRUST’s institutional outsourced assets under management as of March 31, 2025. CAPTRUST nor its advisors paid a fee to Pensions & Investments to obtain or use the ranking. For more information on the methodology, please see go [here](#).

Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax



advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors