

The following is an English version of the official Japanese announcement, which has been given to the Tokyo Stock Exchange and the media in Tokyo, Japan.



January 25, 2024  
SPARX Group Co., Ltd.  
President and Group CEO Shuhei Abe  
(Code: 8739, TSE Prime Market)

**First Wealth Advisor Award  
Notice of the Winning of the New “NISA Growth Quota WA Fund Awards”**

TOKYO—January 25, 2024—SPARX Group Co., Ltd. (SPARX; Prime:8739) today announced that the following fund managed by its subsidiary SPARX Asset Management Co., Ltd. have won the Wealth Advisor Award, selected by Wealth Advisor Co., Ltd.

New “NISA Growth Quota WA Fund Award”  
Japanese Equity Fund category  
SPARX New Global Blue Chip Japanese Equity Fund (“Gensentoshi”)

Encouraged further by this prize, all members at the SPARX Group remain dedicated to improve our investment capabilities, product offerings and client service activities, such that more and more investors come to recognize SPARX as a leading Japanese and Asian Equity investment manager.

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Methodology for “NISA Growth Quota WA Fund Awards”

(1) Eligible Universe

As of December 2023, 1,816 domestic open-ended funds (excluding ETFs) registered in NISA Growth Quota. Of these, we limit our universe to 1,312 active funds.

(2) Categories and Number of Funds

Japan domiciled Equity: 237 funds  
International Equity (Global): 307 funds  
International Equity (Specific Region): 239 funds  
Bonds: 155 funds  
Balanced: 299 funds  
Alternative: 75 funds  
Total: 1,312 funds

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### (3) Analysis Method

As New “NISA Growth Quota WA Fund Awards”, we focus on quantitative evaluation. It is important that the recent performance is better, but we also place importance on longer-term performance. In addition to performance, we evaluated basic items that are essential for achieving stable management in the future (such as net inflow/outflow of funds, net asset value, and costs). In addition, we took into consideration the category-specific characteristics of each sector, and we have taken care to ensure that the candidate funds do not lean too heavily towards a particular category.

Disclaimer;

“NISA Growth Quota WA Fund Awards” is based on data from December 29, 2023, and does not guarantee the performance of any fund in the future.

The award was evaluated using data that Wealth Advisor has deemed reliable, but Wealth Advisor does not guarantee the accuracy or completeness of the data. The award was based on a proprietary analysis of Japan domestic open-ended active funds that are registered in NISA Growth Quota as of December 29, 2023.

Japanese Equity Fund category was selected from the 237 funds that belong to that category as of November 30, 2023.

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About Wealth Advisor Co., Ltd.

Wealth Advisor Co., Ltd. (formerly Morningstar Japan K.K.) has been conducting financial product evaluation, focusing on domestic investment trusts, for over 25 years since its establishment on March 27, 1998.

On March 30, 2023, the company returned its brand to Morningstar, Inc. Wealth Advisor Co., Ltd. has continued to conduct investment trust evaluation in a neutral and objective manner.

No further entry