

# J.P. Morgan Investment Management Inc.

## Form ADV Part 2B Brochure Supplements

### International Equity Group

The Form ADV Part 2B Brochure Supplements within this booklet contain biographical and other information about the supervised persons with the most significant responsibility for the day-to-day investment advice provided to clients in the investment strategies listed below.

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
Developed International Value Team	Michael Barakos	Portfolio Manager
	Thomas Buckingham	Portfolio Manager
	Ian Butler	Portfolio Manager
	Kyle Williams	Portfolio Manager
	Anjali Balani	Investment Specialist
	Nelson Edwards	Investment Specialist

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
International Equity Team	Shane Duffy	Portfolio Manager
	Thomas J Murray	Portfolio Manager
	Zenah Shuhaiber	Portfolio Manager
	James M Sutton	Portfolio Manager
	Anjali Balani	Investment Specialist
	Hyung Chun	Investment Specialist
	Timothy Devlin	Investment Specialist
	Isabella Giordano	Investment Specialist

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
International Focus Team	Shane Duffy	Portfolio Manager
	Thomas J Murray	Portfolio Manager
	Anjali Balani	Investment Specialist
	Hyung Chun	Investment Specialist
	Timothy Devlin	Investment Specialist
	Isabella Giordano	Investment Specialist

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
International Growth Team	James Andrew	Portfolio Manager
	Shane Duffy	Portfolio Manager
	Thomas J Murray	Portfolio Manager
	Anjali Balani	Investment Specialist
	Timothy Devlin	Investment Specialist
	Isabella Giordano	Investment Specialist

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
International Hedged Equity Team	Matthew Bensen	Portfolio Manager
	Winnie Cheung	Portfolio Manager
	Nicholas Farserotu	Portfolio Manager
	Piera Elisa Grassi	Portfolio Manager
	Judy Jansen	Portfolio Manager
	Hamilton Reiner	Portfolio Manager
	Timothy Devlin	Investment Specialist
	Isabella Giordano	Investment Specialist

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
International REI Team	Winnie Cheung	Portfolio Manager
	Nicholas Farserotu	Portfolio Manager
	Piera Elisa Grassi	Portfolio Manager
	Sebastian Wiseman	Portfolio Manager
	Anjali Balani	Investment Specialist
	Timothy Devlin	Investment Specialist

Investment Strategy-INTERNATIONAL STRATEGIES	Supervised Person	Role
International Value Team	Michael Barakos	Portfolio Manager
	Thomas Buckingham	Portfolio Manager
	Ian Butler	Portfolio Manager
	Joyce Weng	Portfolio Manager
	Kyle Williams	Portfolio Manager
	Anjali Balani	Investment Specialist
	Nelson Edwards	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Global Team	Sandeep Bhargava	Portfolio Manager
	Richard Morillot	Portfolio Manager
	Hyung Chun	Investment Specialist
	Isabella Giordano	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Global Equity Income Unconstrained Team	Michael Rossi	Portfolio Manager
	Helge Skibeli	Portfolio Manager
	Sam Witherow	Portfolio Manager
	Anjali Balani	Investment Specialist
	Hyung Chun	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Global Health care Team	Bartjan van Hulten	Portfolio Manager
	Dominic Valder	Portfolio Manager
	Anjali Balani	Investment Specialist
	Nelson Edwards	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Global REI Team	Piera Elisa Grassi	Portfolio Manager
	Raffaele Zingone	Portfolio Manager
	Anjali Balani	Investment Specialist
	Timothy Devlin	Investment Specialist
	Isabella Giordano	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Global Select Team	Christian Pecher	Portfolio Manager
	Helge Skibeli	Portfolio Manager
	Anjali Balani	Investment Specialist
	Hyung Chun	Investment Specialist
	Timothy Devlin	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Climate Change Solutions Team	Fred Barasi	Portfolio Manager
	Jack Featherby	Portfolio Manager
	Yazann Romahi	Portfolio Manager
	Timothy Devlin	Investment Specialist

Investment Strategy-GLOBAL STRATEGIES	Supervised Person	Role
Sustainable Infrastructure Team	Fred Barasi	Portfolio Manager
	Victor Li	Portfolio Manager
	Anjali Balani	Investment Specialist

Investment Strategy-EUROPE STRATEGIES	Supervised Person	Role
Europe Dynamic Team	Blake Crawford	Portfolio Manager
	Jonathan James Ingram	Portfolio Manager
	Alexander Whyte	Portfolio Manager
	Anjali Balani	Investment Specialist
	Hyung Chun	Investment Specialist
	Timothy Devlin	Investment Specialist

Investment Strategy-EUROPE STRATEGIES	Supervised Person	Role
Europe Dynamic Low Risk Team	Blake Crawford	Portfolio Manager
	Victoria Helvert	Portfolio Manager
	Alexander Whyte	Portfolio Manager
	Thomas Bradley-Flannagan	Investment Specialist

Investment Strategy-EUROPE STRATEGIES	Supervised Person	Role
Europe Focused European Multinationals (FEM) Team	Timothy Lewis	Portfolio Manager
	Rajesh C Tanna	Portfolio Manager
	Maciej Wasilewicz	Portfolio Manager
	Amit Parmar	Investment Specialist

## Form ADV Part 2B

### Brochure Supplement

#### **James Andrew**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7424750

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025 provides information about Mohamed Abubakar that supplements the J.P. Morgan Investment Management Inc. ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

James Andrew (born 1977) is a Portfolio Manager in the International Equity Group, based in London, with particular responsibility for International Growth portfolios. An employee since 2007, James previously held the role of research analyst specializing in consumer discretionary, having previously been part of the European Apparel & Specialty Retail team at Sanford C. Bernstein. Prior to Bernstein, James was an investment manager with shareholder activist fund Hermes Focus Asset Management. James holds a MEng in Manufacturing Engineering from Cambridge University and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

James Andrew has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

James Andrew is not actively engaged in any other investment related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to James Andrew for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

James Andrew is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of James Andrew are supervised by Shane Duffy, managing director. His contact number is (44) 207-7428934.

## Form ADV Part 2B

### Brochure Supplement

#### Anjali Balani

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(212) 622-0660

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Anjali Balani that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Anjali Balani** (born 1984) is the US head of the Investment Specialist team within the J.P. Morgan Asset Management International Equity Group, based in New York. An employee since 2012, she previously worked on the Institutional Advisor sales team working primarily with RIAs in the Northeast and thereafter moved within the firm to Mumbai, India in a global strategic relationships role. Anjali graduated summa cum laude with a dual concentration in Finance and Accounting from Boston University, obtained her MBA from NYU Stern, and received her CIMA® from Wharton.

The Certified Investment Management Analyst designation is issued by the Investments & Wealth Institute (IWI), formerly IMCA. In order to obtain a CIMA designation, a person must (i) pass a background check (ii) complete approximately 100 hours of study in exam preparation to pass a two-hour Qualification Examination (iii) successfully complete an in-person or online executive education program at a top-20 business school registered with IWI (iv) complete approximately 150 hours of study in exam preparation to pass a four-hour comprehensive Certification Examination, and (v) document a minimum of 3 years work experience in financial services, pass a second background check and agree to adhere to IWI's Ethics and ongoing standards. CIMA certification must be renewed every two years. Certification renewal requirements include (i) a minimum of 40 hours of continuing education credit, including two hours of ethics education (ii) complete a compliance disclosure and indicate continued adherence to IWI's Code of Professional Responsibility, and Rules and Guidelines for Use of the Marks, as well as disclose any federal or state regulatory actions or complaints.

#### DISCIPLINARY INFORMATION

Anjali Balani has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Anjali Balani is a registered representative with the Financial Industry Regulatory Authority under the registration of J.P. Morgan Institutional Investments Inc. ("JPMII"), an affiliated broker-dealer. JPMII serves as placement agent for certain private investment funds managed by JPMIM.

Anjali Balani is also registered with the National Futures Association as an associated person of JPMIM, a registered commodity pool operator and commodity trading advisor.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Anjali Balani for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Anjali Balani is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Anjali Balani are supervised by Frances D Gerhold, managing director. Her contact number is (44) 207-7423435.

## Form ADV Part 2B

### Brochure Supplement

#### **Michael Barakos**

International Equity Group  
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#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
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This brochure supplement dated December 18, 2025, provides information about Michael Barakos that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Michael Barakos** (born 1977) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. Michael is the lead of the Style investment team and is also a member of J.P. Morgan's Asset Management Investment Committee. An employee since 1999, Michael joined the firm as a graduate trainee. He held positions as CIO of the European Equities Behavioural Finance process from 2009-2016 and as co-CIO of International Equities Behavioural Finance process from 2017- 2020. He obtained a BSc (Hons) in Economics from the London School of Economics and Political Science and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

Michael Barakos has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Michael Barakos is not actively engaged in any other investment related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Ian Crossman for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Michael Barakos is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Michael Barakos supervised by Malcolm I Smith, managing director. His contact number is (44) 207-1343652.

## Form ADV Part 2B

### Brochure Supplement

#### Fred Barasi

International Equity Group  
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This brochure supplement dated December 18, 2025, provides information about Fred Barasi that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Fred Barasi** (born 1979) is an analyst within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2017, Fred was previously with Moody's Investor Services, where he was a credit analyst. Fred obtained a MA in Mathematics from the University of Cambridge and earned a MSc. in operation research from the London School of Economics and Political Science. He is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Fred Barasi has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Fred Barasi is not actively engaged in any other investment related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Fred Barasi for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Fred Barasi is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Fred Barasi are supervised by Maciej Wasilewicz, managing director. His contact number is (44) 207- 7423605.



## Form ADV Part 2B

### Brochure Supplement

#### **Matthew Bensen**

U.S. Equities  
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#### **J.P. Morgan Investment Management Inc.**

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This brochure supplement dated December 18, 2025, provides information about Matthew Bensen that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Matthew Bensen** (born 1993) is a member of the portfolio management team for derivatives-based strategies in the U.S. Equity group. An employee since 2015, Matt is responsible for helping lead portfolio manager Hamilton Reiner manage the derivatives portfolios of Hedged Equity, Equity Premium Income, and International Hedged Equity on a day-to-day basis. Prior to assuming this role, Matt worked as an analyst for J.P. Morgan's U.S. Equity Value portfolio management team, where he conducted daily portfolio implementation and analytics. Matt holds a B.B.A. in Finance from the University of Notre Dame. He is a CFA charterholder and has his Series 3 license.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

Matthew Bensen has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Matthew Bensen is not actively engaged in any other investment related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Matthew Bensen for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Matthew Bensen is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Matthew Bensen are supervised by Hamilton Reiner, managing director. His contact number is (212) 648-1033.

## Form ADV Part 2B

### Brochure Supplement

#### **Sandeep Bhargava**

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#### **J.P. Morgan Investment Management Inc.**

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This brochure supplement dated December 18, 2025, provides information about Sandeep Bhargava that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Sandeep Bhargava** (born 1964) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He manages global mandates and thematic strategies focused on sustainable food and natural capital. An employee since 1997, Sandeep was previously a product manager for Indian Asset Management in Asia. Prior to joining the firm, Sandeep spent two years managing Asian emerging market funds with a focus on technology and pharmaceuticals at Barclays Global Investors in London. Sandeep began his career lecturing at the University of York, combining this with consulting roles at several financial institutions including The World Bank in Washington, ICICI Bank in India and the United Nations Conference on Trade and Development in Switzerland. Sandeep holds a BA in Economics from Cambridge University and a DPhil in Economics from Oxford University.

#### **DISCIPLINARY INFORMATION**

Sandeep Bhargava has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Sandeep Bhargava is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Sandeep Bhargava for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Sandeep Bhargava is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Sandeep Bhargava are supervised by Nicholas J Horne, managing director. His contact number is (44) 207- 7426394.

## Form ADV Part 2B

### Brochure Supplement

#### Tom Bradley-Flannagan

International Equity Group  
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#### J.P. Morgan Investment Management Inc.

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This brochure supplement dated December 18, 2025, provides information about Tom Bradley-Flannagan that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Tom Bradley-Flannagan** (born 1988) is an investment specialist within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2010, Tom joined the firm as a graduate trainee. He previously worked within the Client Account Management Team. Tom obtained a BSc in Business Management from the University of Manchester and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Tom Bradley-Flannagan has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Tom Bradley-Flannagan is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Tom Bradley-Flannagan for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Tom Bradley-Flannagan is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Tom Bradley-Flannagan are supervised by Louise Bonzano, managing director. Her contact number is (44) 207-7427813.

## Form ADV Part 2B

### Brochure Supplement

#### Thomas Buckingham

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
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#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
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This brochure supplement dated December 18, 2025, provides information about Thomas Buckingham that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Thomas Buckingham** (born 1984) is a portfolio manager in the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Style investment team, with a particular focus on income and value mandates. An employee since 2007, Tom joined the firm as a graduate trainee. He holds a BEng degree in Aerospace Engineering from the University of Surrey and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Thomas Buckingham has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Thomas Buckingham is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Thomas Buckingham for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Thomas Buckingham is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Thomas Buckingham are supervised by Michael Barakos, managing director. His contact number is (44) 207-7428935.

## Form ADV Part 2B

### Brochure Supplement

#### Ian Butler

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7426351

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
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This brochure supplement dated December 18, 2025, provides information about Ian Butler that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Ian Butler** (born 1982) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2005, Ian joined the firm as a graduate trainee. He is a member of the Style investment team, with a particular focus on value mandates. He graduated at the University of Bath and holds a BSc degree in Business Administration and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Ian Butler has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Ian Butler is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Ian Butler for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Ian Butler is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Ian Butler are supervised by Michael Barakos, managing director. His contact number is (44) 207-7428935.

## Form ADV Part 2B

### Brochure Supplement

#### Winnie Cheung

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7425093

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Winnie Cheung that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Winnie Cheung** (born 1987), is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. She is a member of the Research Enhanced Index Portfolio Management Team. An employee since 2012, Winnie obtained a MSc in Finance from Cass Business School in London.

#### DISCIPLINARY INFORMATION

Winnie Cheung has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Winnie Cheung is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Winnie Cheung for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Winnie Cheung is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Winnie Cheung are supervised by Piera Elisa Grassi, managing director. Her contact number is (44) 207- 7425603.

## Form ADV Part 2B

### Brochure Supplement

#### Hyung Chun

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(212) 648-1983

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Hyung Chun that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Hyung Chun**, (born 1981) is an investment specialist within the J.P. Morgan Asset Management International Equity, based in New York. An employee since 2004, he previously worked as an analyst in the Investment Bank prior to joining Asset Management. Before joining the firm, Hyung worked at a capital markets law firm, Cadwalader Wickersham & Taft. Hyung has a B.S. in Management and Business from Skidmore College and holds the Series 3, 7 and 63 licenses.

#### DISCIPLINARY INFORMATION

Hyung Chun has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Hyung Chun is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Hyung Chun for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Hyung Chun is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Hyung Chun are supervised by Anjali Balani, managing director. Her contact number is (1) 212-622-0660.



## Form ADV Part 2B

### Brochure Supplement

#### Blake Crawford

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7421283

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Blake Crawford that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Blake Crawford** (born 1984) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Dynamic investment team. An employee since 2008, Blake joined the firm as a graduate trainee. Blake obtained a BSc in Economics from the University of Bath and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Blake Crawford has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Blake Crawford is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Blake Crawford for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Blake Crawford is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Blake Crawford are supervised by Jonathan James Ingram, managing director. His contact number is (44) 207- 7425379.



## Form ADV Part 2B

### Brochure Supplement

#### **Timothy Devlin**

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(212) 648-1114

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Timothy Devlin that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Timothy Devlin** (born 1963) is an investment specialist within the J.P. Morgan Asset Management International Equity Group, and co-leads the New York based investment specialist team. Tim re-joined the firm in 2012 and was previously an US equity portfolio strategist at Artio Global where he had earlier been director of client service working primarily with the firm's international equity clients. He obtained a BA in Economics from Union College.

#### **DISCIPLINARY INFORMATION**

Timothy Devlin has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Timothy Devlin is a registered representative with the Financial Industry Regulatory Authority under the registration of J.P. Morgan Institutional Investments Inc. ("JPMII"), an affiliated broker-dealer. JPMII serves as placement agent for certain private investment funds managed by JPMIM.

Timothy Devlin is also registered with the National Futures Association as an associated person of JPMIM, a registered commodity pool operator and commodity trading advisor.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Timothy Devlin for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Timothy Devlin is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Timothy Devlin are supervised by Anjali Balani, managing director. Her contact number is (212) 622-0660.

## Form ADV Part 2B

### Brochure Supplement

#### Shane Duffy

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7428934

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Shane Duffy that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Shane Duffy** (born 1977) is a portfolio manager in the International Equity Group, based in London, which particular responsibility for International Growth, International Focus, and JIG (ETF) portfolios. An employee since 1999, Shane was previously a global sector specialist covering the consumer discretionary sector. Shane joined the team in 1999, holds a MA in History from Cambridge University, and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Shane Duffy has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Shane Duffy is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Shane Duffy for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Shane Duffy is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Shane Duffy are supervised by Malcolm I Smith, managing director. His contact number is (44) 207-1343652.

## Form ADV Part 2B

### Brochure Supplement

#### Nelson Edwards

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(1)-646-722-2221

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Nelson Edwards that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Nelson Edwards** (born 1990) is a member of the Investment Specialist team within the J.P. Morgan Asset Management International Equity Group, based in New York. An employee since 2012, Nelson previously worked as an Investment Specialist in the Global Fixed Income, Currency & Commodities (GFICC) group, covering US Broad Markets strategies. Prior to joining the firm in 2012, Nelson interned at Wells Fargo Securities in their fixed income sales and trading unit. Nelson holds a B.B.A. with a concentration in finance from the Ross School of Business at the University of Michigan, holds FINRA Series 3, 7 and 63 licenses, and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Nelson Edwards has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Nelson Edwards is not actively engaged in any other investment- related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Nelson Edwards for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Nelson Edwards is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Nelson Edwards are supervised by Anjali Balani, managing director. Her contact number is (1) 212-622- 0660.

## Form ADV Part 2B

### Brochure Supplement

#### Nicholas Farserotu

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7427448

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Nicholas Farserotu that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Nicholas Farserotu** (born 1988) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Research Enhanced Index Portfolio Management Team. An employee since 2015, Nicholas was previously an investment analyst at SphereInvest Group. Nicholas obtained an MSc. in Financial Engineering from Imperial College London and holds an MSc. and a BSc. in Economics from the University of Geneva. He is also a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Nicholas Farserotu has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Nicholas Farserotu is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Nicholas Farserotu for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with client's investment objectives and account guidelines and the group's current investment processes and practices.

Nicholas Farserotu is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Nicholas Farserotu are supervised by Piera Elisa Grassi, Managing Director. Her contact number is (44) 207- 7425603.

## Form ADV Part 2B

### Brochure Supplement

#### Jack Featherby

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-1343984

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Jack Featherby that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jack Featherby (born 1991), CFA, is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Europe Small Cap investment team but has additional global small cap responsibilities. An employee since 2018, Jack previously held merger and acquisitions advisory roles with Rothschild and Wells Fargo. Jack holds an MEng in Materials, Economics and Management from the University of Oxford.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Jack Featherby has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Jack Featherby is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Jack Featherby for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Jack Featherby is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Jack Featherby are supervised by Jonathan James Ingram, managing director. His contact number is (44) 207- 7425379.

## Form ADV Part 2B

### Brochure Supplement

#### **Isabella Giordano**

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(212) 648-1897

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Isabella Giordano that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Isabella Giordano** (born 1994) is an Investment Specialist within the J.P. Morgan Asset Management International Equity Group, based in New York. An employee since 2016, she previously worked as an internal sales lead in the payments business for the Corporate and Investment Bank, servicing financial institutions. Isabella graduated cum laude with a BBA in Finance and Economics from Loyola University Maryland and holds Series 7, 63 and 3 licenses.

#### **DISCIPLINARY INFORMATION**

Isabella Giordano has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Isabella Giordano is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Isabella Giordano for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Isabella Giordano is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Isabella Giordano are supervised by Anjali Balani, managing director. Her contact number is (1) 212-622- 0660.

## Form ADV Part 2B

### Brochure Supplement

#### **Piera Elisa Grassi**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7425603

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Piera Elisa Grassi that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Piera Elisa Grassi** (born 1976) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. She is the lead of the Research Enhanced Index Portfolio Management Team. An employee since 2004, Piera Elisa was previously a quantitative analyst and portfolio manager for global strategies. Prior to joining, Piera Elisa was a bond quantitative analyst and risk analyst at Foreign and Colonial Asset Management. Before this, she worked for BARRA in London, focusing on equity risk management and portfolio construction. Piera Elisa obtained a MA (equivalent) in Economics from Bocconi University in Milan.

#### **DISCIPLINARY INFORMATION**

Piera Elisa Grassi has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Piera Elisa Grassi is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Piera Elisa Grassi for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Piera Elisa Grassi is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Piera Elisa Grassi are supervised by Malcolm I Smith, managing director. His contact number is (44) 207-1343652.



## Form ADV Part 2B

### Brochure Supplement

#### Victoria Helvert

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7425057

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Victoria Helvert that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Victoria Helvert** (born 1991) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. She is a member of the Dynamic investment team. An employee since 2013, Victoria joined the firm as a graduate trainee. She was previously a management associate in the Asset Management Solutions team. Victoria holds a BA in Economics from Durham University and is ACA qualified. She is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Victoria Helvert has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Victoria Helvert is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Victoria Helvert for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Victoria Helvert is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Victoria Helvert are supervised by Alexander Whyte, executive director. His contact number is (44) 207-7429057.



## Form ADV Part 2B

### Brochure Supplement

#### Bartjan van Hulten

U.S. Equities  
60 Victoria Embankment, London, EC4Y0JP, United Kingdom  
(212) 648-0707

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Bartjan van Hulten that supplements the J.P. Morgan Investment Management Inc. ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Bartjan van Hulten** (born 1970) is an analyst in the U.S. Equity Research Group covering the Pharmaceuticals/Biotechnology sector. Prior to joining JP Morgan, Bartjan ran Medex Capital, a global healthcare fund he founded in 2011. Before that, he was at Fidelity Investments as healthcare team leader, covering healthcare investments across a broad range of European and US portfolios. From 1998 to 2003, he led the healthcare research team at MeesPierson (ABNAmro), covering European and US healthcare companies. He began his career at Raytheon in 1996 having completed service as a lieutenant in the Dutch Navy. Bartjan holds a Masters in Business Administration from Insead and a Masters in Science in Applied Physics from Delft University of Technology, the Netherlands. He is also a CFA Charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Bartjan van Hulten has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Bartjan van Hulten is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Bartjan van Hulten for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Bartjan van Hulten is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Bartjan van Hulten are supervised by David E Small, managing director. His contact number is (212) 648-0752.

## Form ADV Part 2B

### Brochure Supplement

#### Jonathan James Ingram

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7425379

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Jonathan James Ingram that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Jonathan James Ingram** (born 1978) is a portfolio manager and Head of the Unconstrained team within the J.P. Morgan Asset Management International Equity Group, based in London. He leads the Dynamic investment team with responsibility for both long and long-short mandates, and additionally has oversight responsibilities for mid and small cap strategies. An employee since 2000, Jon joined the firm as a graduate trainee. He was previously a quantitative investment analyst within the Currency Group. He obtained an M.Eng in Metallurgy and Science of Materials from the University of Oxford and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Jonathan James Ingram has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Jonathan James Ingram is not actively engaged in any other investment- related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Jonathan James Ingram for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Jonathan James Ingram is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Jonathan James Ingram are supervised by Malcolm I Smith, Managing Director. His contact number is (44) 207-1343652.

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### Brochure Supplement

#### Judy Jansen

U.S. Equities  
270 Park Avenue, New York, NY, 10017-2014  
(212) 648-0255

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Judy Jansen that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Judy Jansen** (born 1992) is a member of the portfolio management team for Equity Options-based strategies in the U.S. Equity group. An employee since 2015, Judy helps manage the business's Equity Derivatives strategies, including Equity Premium Income, Nasdaq Equity Premium Income, Global Equity Premium Income, Hedged Equity, and International Hedged Equity. Prior to assuming this role, Judy was a U.S. Equity Investment Specialist, co-leading the Equity Options-based portfolios and responsible for the U.S. Equity Core strategies. She began her career at J.P. Morgan as an analyst for the U.S. Equity Value portfolio management team. Judy holds a B.A. from Princeton University and an M.B.A. from the Wharton School of the University of Pennsylvania. She holds Series 7, Series 63, and NFA Series 3 licenses. She is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Judy Jansen has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Judy Jansen is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Judy Jansen for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Judy Jansen is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Judy Jansen are supervised by Hamilton Reiner, managing director. His contact number is (212) 648-1033.

## Form ADV Part 2B

### Brochure Supplement

#### Timothy Lewis

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7429068

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Timothy Lewis that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Timothy Lewis** (born 1987) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He has a particular focus on core Europe mandates. An employee since 2013, Tim joined the firm as a graduate trainee. He obtained a BA in Business and Economics at Trinity College Dublin, and an MSc in Behavioral Economics from the University of Nottingham and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Timothy Lewis has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Timothy Lewis is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Timothy Lewis for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Timothy Lewis is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Timothy Lewis are supervised by Rajesh Tanna, managing director. His contact number is (44) 207-7422525.

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### Brochure Supplement

#### Victor Li

Quantitative Solutions  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7425313

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Victor Li that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Wei (Victor) Li**, PhD (born 1981) is Head of Research and a portfolio manager in the Quantitative Solutions group, based in London. Victor's primary responsibilities include the oversight of the team's research agenda, AI & thematic investing research, portfolio management for quantitative and thematic strategies. His research focus also include factor-based & risk premia strategies, machine learning techniques, quantitative asset allocation. Prior to joining the firm in 2010, Victor completed a PhD in Signal Processing at Imperial College London, where he was also employed as a research assistant. Victor additionally has an MSc with Distinction in Communications Engineering from the University of Manchester, a BEng in Information Engineering from the Beijing Institute of Technology, and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Victor Li has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Victor Li is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Victor Li for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Victor Li is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Victor Li are supervised by Yazann Romahi, PhD, CFA, managing director. His contact number is +44 (207) 742-5122.

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### Brochure Supplement

#### **Craig R Morgan**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7427203

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Craig R Morgan that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Craig R Morgan** (born 1988) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Global Core Portfolio Management Team. An employee since 2013, Craig was previously an implementation specialist and before that, was with Bank of America Merrill Lynch as a business analyst within the technology team. Craig obtained an MPhys from the University of Oxford. He is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

Craig R Morgan has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Craig R Morgan is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Craig R Morgan for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Craig R Morgan is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Craig R Morgan are supervised by Helge Skibeli, managing director. His contact number is (44) 736-0230141.



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## Brochure Supplement

### Richard Morillot

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7424051

### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Richard Morillot that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Richard Morillot** (born 1985) is a quantitative analyst and portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2013, Richard previously held positions on the trading and quantitative research teams with BlackRock. Richard obtained a BS in Statistics from ENSAE, Paris and a MS in Financial Engineering from Columbia University. Richard is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Richard Morillot has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Richard Morillot is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Richard Morillot for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Richard Morillot is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Richard Morillot are supervised by Philippa Clough, Executive Director. Her contact number is (44) 207-7424248.

## Form ADV Part 2B

### Brochure Supplement

#### Thomas J Murray

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7424955

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Thomas J Murray that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Thomas J Murray** (born 1972) is a portfolio manager in the International Equity Group, based in London, with particular responsibility for International Equity, ACWI ex US, and International Focus portfolios. An employee since 1996, Tom was previously a global sector specialist covering the energy sector. Tom holds a BA (Hons) in Classics from Bristol University and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Thomas J Murray has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Thomas J Murray is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Thomas J Murray for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Thomas J Murray is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Thomas J Murray are supervised by Malcolm I Smith, managing director. His contact number is (44) 207-1343652.



## Form ADV Part 2B

### Brochure Supplement

#### **Michela De Nicola**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 203-4934136

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Michela De Nicola that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Michela De Nicola** (born 1973) is an investment specialist within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2022, Michela was previously an investment specialist at Barings and Legal and General. Michela holds a summa cum laude degree in Financial Markets & Institutions from Università Bocconi, a MSc in Finance from London Business School and is fluent in Italian, English and French.

#### **DISCIPLINARY INFORMATION**

Michela De Nicola has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Michela De Nicola is not actively engaged in any other investment- related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Michela De Nicola for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Michela De Nicola is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Michela De Nicola are supervised by Louise Bonzano, managing director. Her contact number is (44) 207-7427813.

## Form ADV Part 2B

### Brochure Supplement

#### Amit Parmar

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7420834

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025 provides information about Amit Parmar that supplements the J.P. Morgan Investment Management Inc. ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Amit Parmar** (born 1987) is an investment specialist within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2011, he previously worked as an analyst in the Investment Bank prior to joining the Private Bank. Amit holds a BSc in Economics from the University of Warwick.

#### DISCIPLINARY INFORMATION

Amit Parmar has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Amit Parmar is not actively engaged in any other investment related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Amit Parmar for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Amit Parmar is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Amit Parmar are supervised by Andrew V Robbins, executive director. His contact number is (44) 207-1349265.

## Form ADV Part 2B

### Brochure Supplement

#### **Christian Pecher**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 203-4938721

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Christian Pecher that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Christian Pecher** (born 1972) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Global Core Portfolio Management Team. An employee since 1998, Christian was previously Head of Developed Asia Research based in Tokyo, and before that a European utilities research analyst. Prior to that, Christian covered the European technology sector. Christian obtained a BSc. in business economics from the University of London and earned an MSc. in Economics from the London School of Economics. He is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

Christian Pecher has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Christian Pecher is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Christian Pecher for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Christian Pecher is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Christian Pecher are supervised by Helge Skibeli, managing director. His contact number is (44) 736-0230141.

## Form ADV Part 2B

### Brochure Supplement

#### Hamilton Reiner

U.S. Equities

270 Park Avenue, New York, NY, 10017-2014

(212) 648-1033

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014

(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Hamilton Reiner that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Hamilton Reiner** (born 1965) is CIO of the U.S. Core Equity Team, Head of U.S. Equity Derivatives for J.P. Morgan Equity Asset Management, and a portfolio manager. He has been managing U.S. equities and U.S. equity derivatives for over 30 years, at firms such as Barclays Capital, Lehman Brothers, and Deutsche Bank. He started his career at the options investing firm O'Connor and Associates, where he developed his passion for derivatives investing. Hamilton obtained a B.S.E. in Finance from the Wharton School of the University of Pennsylvania.

#### DISCIPLINARY INFORMATION

Hamilton Reiner has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Hamilton Reiner is not actively engaged in any other investment related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Hamilton Reiner for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Hamilton Reiner is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Hamilton Reiner are supervised by Jonathan M Sherman, Managing Director. His contact number is (212) 648-1888.

## Form ADV Part 2B

### Brochure Supplement

#### Yazann Romahi

Quantitative Solutions  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7425122

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Yazann Romahi that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Yazann Romahi**, PhD, CFA (born 1976) is Chief Investment Officer for Quantitative Solutions, part of AM Solutions, focused on managing and developing the firm's systematic and factor-based franchise across strategic beta and thematic. He is also responsible for leading the firm's Multi-Asset Quantitative Research capabilities. Prior to joining J.P. Morgan in 2003, Yazann worked as a research analyst at the Centre for Financial Research at the University of Cambridge and undertook consulting assignments for a number of financial institutions including Pioneer Asset Management, PricewaterhouseCoopers and HSBC. Yazann holds a MSc in Artificial Intelligence from the University of Edinburgh and a PhD in Computational Finance from the University of Cambridge and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Yazann Romahi has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Yazann Romahi is not actively engaged in any other investment related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Yazann Romahi for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Yazann Romahi is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Yazann Romahi supervised by Jamie Kramer, CFA, managing director. Her contact number is (212) 464-1560.

## Form ADV Part 2B

### Brochure Supplement

#### **Michael Rossi**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 203-4930929

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Michael Rossi that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Michael Rossi** (born 1994) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2019, Michael was previously with HSBC Global Asset Management. He holds a Masters in Finance from the London School of Economics and Political Science, and a first-class Bachelor's degree in Economics and Finance from the University of Exeter and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

Michael Rossi has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Michael Rossi is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Michael Rossi for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Michael Rossi is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Michael Rossi are supervised by Sam Witherow, managing director. His contact number is (44) 207-7423917.

## Form ADV Part 2B

### Brochure Supplement

#### Zenah Shuhaiber

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7421245

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Zenah Shuhaiber that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Zenah Shuhaiber** (born 1984) is a portfolio manager within J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2005, she obtained a MA in Economics and Management at the University of Oxford. Zenah is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Zenah Shuhaiber has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Zenah Shuhaiber is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Zenah Shuhaiber for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Zenah Shuhaiber is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Zenah Shuhaiber are supervised by Thomas J Murray, managing director. His contact number is (44) 207-7424955.



## Form ADV Part 2B

### Brochure Supplement

#### Helge Skibeli

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(44) 736-0230141

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Helge Skibeli that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Helge Skibeli** (born 1961) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in New York. He leads the Global Core Portfolio Management Team. An employee since 1990, Helge was previously the Global Head of Developed Market Equity Research. Before that he was Head of Research for the US, based in New York, which followed being Head of Asia ex Japan Research, based in Singapore. Prior to that he was a research analyst for European autos and basic industries. Helge obtained an MA in General Business from the Norwegian School of Management and earned an MBA from the University of Wisconsin-Madison. He is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Helge Skibeli has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Helge Skibeli is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Helge Skibeli for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Helge Skibeli is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Helge Skibeli are supervised by Malcolm I Smith, managing director. His contact number is (44) 207-1343652.



## Form ADV Part 2B

### Brochure Supplement

#### Malcolm I Smith

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-1343652

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Malcolm I Smith that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Malcolm I Smith** (born 1981) is Head of the J.P. Morgan Asset Management International Equity Group. An employee since 2014, Malcolm was previously with BlackRock where he was a managing director within the Fundamental Equities Group. Malcolm obtained a MA (with Honours) in Accountancy from The University of Aberdeen.

#### DISCIPLINARY INFORMATION

Malcolm I Smith has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Malcolm I Smith is registered with the National Futures Association as an associated person of JPMIM, a registered commodity pool operator and commodity trading advisor.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Malcolm I Smith for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Malcolm I Smith is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Malcolm I Smith are supervised by Paul A Quinsee, managing director. His contact number is (212) 648-0712.

## Form ADV Part 2B

### Brochure Supplement

#### James M Sutton

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7422123

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about James M Sutton that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**James M Sutton** (born 1987) is a portfolio manager in the International Equity Group, based in London, with particular responsibility for the International Equity and ACWI ex US portfolios. An employee since February 2010, James was previously a global sector specialist specializing in metals and mining, and prior to this, he was a client portfolio manager on the International Equity Group, primarily responsible for natural resources products. James achieved a BA in Modern History from the University of Oxford and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

James M Sutton has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

James M Sutton is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to James M Sutton for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

James M Sutton is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of James M Sutton are supervised by Thomas J Murray, managing director. His contact number is (44) 207-7424955.

## Form ADV Part 2B

### Brochure Supplement

#### **Rajesh C Tanna**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7422525

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Rajesh C Tanna that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Rajesh C Tanna** (born 1974) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is the lead of a team of global and European equity portfolio managers. An employee since 2011, Raj joined the Private Bank as an equity strategist and was previously a long-only equity portfolio manager with Credit Suisse. Raj holds a BA in Economics and International Studies, and a master's degree in Management Science and Operational Research, both from Warwick Business School. He is also a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### **DISCIPLINARY INFORMATION**

Rajesh C Tanna has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Rajesh C Tanna is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Rajesh C Tanna for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Rajesh C Tanna is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Rajesh C Tanna are supervised by Malcolm I Smith, managing director. His contact number is (44) 207-1343652.

## Form ADV Part 2B

### Brochure Supplement

#### **Raphaelle Trancart**

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7427316

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Raphaelle Trancart that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Raphaelle Trancart** (born 1980) is an investment specialist within the J.P. Morgan Asset Management International Equity Group. An employee since August 2012, Raphaelle previously worked at AXA Investment Managers in Paris as a product development manager. Before that, she was an institutional sales manager at LAAMA, distributor of AXA Investment Managers' products in Latin America, based in Chile. Raphaelle obtained an MSc in Management from HEC Paris and a BA in European Politics from the Institut d'Etudes Politiques de Lille.

#### **DISCIPLINARY INFORMATION**

Raphaelle Trancart has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Raphaelle Trancart is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Raphaelle Trancart for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Raphaelle Trancart is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Raphaelle Trancart are supervised by Louise Bonzano, managing director. Her contact number is (44) 207-7427813.

## Form ADV Part 2B

### Brochure Supplement

#### **Dominic Valder**

International Equity Group  
60 Victoria Embankment, London, EC4Y0JP, United Kingdom  
(44) 207-7424273

#### **J.P. Morgan Investment Management Inc.**

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Dominic Valder that supplements the J.P. Morgan Investment Management Inc. ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Dominic Valder** (born 1973) is a global sector specialist within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since 2020, Dominic previously worked for Fidelity International as a senior investment analyst for the US healthcare sector. Dominic earned a BA and MA in Biochemistry at Oxford University.

#### **DISCIPLINARY INFORMATION**

Dominic Valder has no disciplinary information to report.

#### **OTHER BUSINESS ACTIVITIES**

Dominic Valder is not actively engaged in any other investment-related business or occupation.

#### **ADDITIONAL COMPENSATION**

No persons (other than clients) provide an economic benefit to Dominic Valder for providing advisory services.

#### **SUPERVISION**

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Dominic Valder is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

The information in this brochure supplement does not include all the specific review processes applicable to a particular client account. Clients are urged to ask questions regarding the review process applicable to their account and to read all product-specific disclosures.

The advisory activities of Dominic Valder are supervised by Rajesh C Tanna, managing director. His contact number is (44) 207-7422525

## Form ADV Part 2B

### Brochure Supplement

#### Maciej Wasilewicz

International Equity Group  
60 Victoria Embankment, London, EC4Y0JP, United Kingdom  
(44)207-7423605

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Maciej Wasilewicz that supplements the J.P. Morgan Investment Management Inc. ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Maciej Wasilewicz** (born 1979) is the Europe Head of Research within the J.P. Morgan Asset Management International Equity Group, based in London. An employee since November 2014, Maciej was previously an analyst for the financial sector within the Emerging Markets and Asia Pacific (EMAP) Equities team, based in Hong Kong. He holds a BComm / LLB (Honours) from the Australian National University.

#### DISCIPLINARY INFORMATION

Maciej Wasilewicz has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Maciej Wasilewicz is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Maciej Wasilewicz for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Maciej Wasilewicz is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Maciej Wasilewicz are supervised by Mark Ferguson, managing director. His contact number is (44) 207-7423870.

## Form ADV Part 2B

### Brochure Supplement

#### Joyce Weng

Emerging Markets and Asia Pacific  
270 Park Avenue, New York, NY, 10017-2014  
(212) 648-0602

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Joyce Weng that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Joyce Weng**, CFA (born 1985) is a portfolio manager for the GEM Diversified, GEM Diversified Equity Plus and ActiveBuilder strategies within the Emerging Markets and Asia Pacific (EMAP) Equities team based in New York. She was previously part of the U.S. Equity Behavioral Finance team at JPMorgan. Prior to joining the Firm in 2010, Joyce worked as a senior analyst at Goldman Sachs Asset Management. Joyce holds a B.A. in Economics (cum laude) and a M.A. in Statistics from Harvard University and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Joyce Weng has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Joyce Weng is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Joyce Weng for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Joyce Weng is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Joyce Weng are supervised by Sonal Tanna, Managing Director. Her contact number is (44) 207-7424027.



## Form ADV Part 2B

### Brochure Supplement

#### Alexander Whyte

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7429057

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Alexander Whyte that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Alexander Whyte**, (born 1991) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Dynamic investment team. An employee since 2013, Alex joined the firm as a graduate trainee. Alex obtained a BA and MEng in Mechanical Engineering from the University of Cambridge and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Alexander Whyte has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Alexander Whyte is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Alexander Whyte for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Alexander Whyte is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Alexander Whyte are supervised by Jonathan James Ingram, managing director. His contact number is (44) 207- 7425379.

## Form ADV Part 2B

### Brochure Supplement

#### Kyle Williams

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7424307

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
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This brochure supplement dated December 18, 2025, provides information about Kyle Williams that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Kyle Williams** (born 1987) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Style investment team, with a particular focus on value mandates. An employee since 2011, Kyle joined the firm as a graduate trainee. He holds an MA in Natural Sciences and an MBBS BChir degree in Medicine from the University of Cambridge and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Kyle Williams has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Kyle Williams is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Kyle Williams for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Kyle Williams is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Kyle Williams are supervised by Tom Buckingham, Executive Director. His contact number is (44) 207-7424159.

## Form ADV Part 2B

### Brochure Supplement

#### Sebastian Wiseman

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-1348528

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Sebastian Wiseman that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Sebastian Wiseman** (born 1994) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in London. He is a member of the Research Enhanced Index Portfolio Management Team. An employee since 2016, Sebastian joined the firm as a graduate trainee. He obtained a MEng in Engineering Science from the University of Oxford and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Sebastian Wiseman has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Sebastian Wiseman is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Sebastian Wiseman for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Sebastian Wiseman is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Sebastian Wiseman are supervised by Piera Elisa Grassi, Managing Director. Her contact number is (44) 207-7425603.

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### Brochure Supplement

#### Sam Witherow

International Equity Group  
60 Victoria Embankment, London, EC4Y 0JP, United Kingdom  
(44) 207-7423917

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Sam Witherow that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Sam Witherow** (born 1985) is a portfolio manager within the International Equity Group, based in London. He is a member of the Global Core Portfolio Management Team, with a focus on income mandates. An employee since 2008, Sam joined the firm as a graduate trainee. He was previously a portfolio manager for global unconstrained mandates, and prior to that a global sector specialist responsible for covering the energy sector. Sam obtained a BSc (Hons) in Economics and Politics from the University of Bristol and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Sam Witherow has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Sam Witherow is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Sam Witherow for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Sam Witherow is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Sam Witherow are supervised by Helge Skibeli, managing director. His contact number is (44) 736-0230141.

## Form ADV Part 2B

### Brochure Supplement

#### Timothy Woodhouse

International Equity Group  
270 Park Avenue, New York, NY, 10017-2014  
(212) 648-1405

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Timothy Woodhouse that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Timothy Woodhouse** (born 1986) is a portfolio manager within the J.P. Morgan Asset Management International Equity Group, based in New York. He has a particular focus on global core and sustainable mandates. An employee since 2008, Tim joined the firm as a graduate trainee. He was previously a research analyst working in the TMT sector. Tim obtained a BSc (Hons) in Economics from the University of York and is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Timothy Woodhouse has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Timothy Woodhouse is not actively engaged in any other investment-related business or occupation.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Timothy Woodhouse for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Timothy Woodhouse is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Timothy Woodhouse are supervised by Rajesh C Tanna, managing director. His contact number is (44) 207-742 2525.

## Form ADV Part 2B

### Brochure Supplement

#### Raffaele Zingone

U.S. Equities

270 Park Avenue, New York, NY, 10017-2014  
(212)648-1871

#### J.P. Morgan Investment Management Inc.

270 Park Avenue, New York, NY, 10017-2014  
(800) 343-1113

This brochure supplement dated December 18, 2025, provides information about Raffaele Zingone that supplements the J.P. Morgan Investment Management Inc ("JPMIM") brochure. You should have received a copy of that brochure. If you did not receive JPMIM's brochure or you have any questions about the contents of this supplement, please contact your client service representative.

#### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Raffaele Zingone** (born 1968) is a senior portfolio manager on the U.S. Structured Equity Team. An employee since 1991, Ralph is responsible for the Research Enhanced Index (REI) strategies and serves as co-portfolio manager on our Hedged Equity and Equity Premium Income strategies. Prior to this role, he was a research analyst following the aerospace, environmental, and diversified manufacturing sectors. Upon joining the firm, he was a quantitative equity analyst and later served as a U.S. Equity portfolio manager in London and New York. Ralph received his B.A. in mathematics and economics from the College of the Holy Cross and his M.B.A. in finance from New York University. He is a CFA charterholder.

The Chartered Financial Analyst designation is issued by the CFA Institute (formerly AIMR). In order to obtain a CFA designation, a person must have either (i) an undergraduate degree or four years of professional experience involving investment decision-making or (ii) four years of qualified work experience (full time, but not necessarily investment related). In addition, the following educational requirements are required to receive a CFA designation (i) completing an educational program which includes approximately 250 hours of study for each of the three levels and (ii) successfully completing three examinations. CFA charterholders must join the CFA Institute as a regular member; and commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. There are no continuing education or ongoing experience requirements.

#### DISCIPLINARY INFORMATION

Raffaele Zingone has no disciplinary information to report.

#### OTHER BUSINESS ACTIVITIES

Raffaele Zingone is registered with the National Futures Association as an associated person of JPMIM, a registered commodity pool operator and commodity trading advisor.

#### ADDITIONAL COMPENSATION

No persons (other than clients) provide an economic benefit to Raffaele Zingone for providing advisory services.

#### SUPERVISION

The Adviser periodically reviews all client accounts to examine compliance with clients' investment objectives and account guidelines and the group's current investment processes and practices.

Raffaele Zingone is a supervised person and an Access Person (as defined under Rule 204A-1 of the Investment Advisers Act) of JPMIM and, as such, is subject to the JPMIM compliance policies and procedures, in addition to the J.P. Morgan Chase Code of Conduct. The Compliance department periodically monitors supervised persons' trading for client accounts. In addition, supervised persons are required to complete periodic compliance training.

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The advisory activities of Raffaele Zingone are supervised by Hamilton Reiner, Managing Director. His contact number is (212) 648-1033.