

SUNCOAST EQUITY MANAGEMENT

Suncoast Equity Management Launches its First Actively Managed ETF on New York Stock Exchange

Firm brings 27-year track record and proven investment discipline to a broader audience with the launch of its first actively managed ETF, available on the NYSE starting May 14th

TAMPA – May 14, 2025 – [Suncoast Equity Management](#), a boutique investment management firm with a growing presence in the intermediary distribution space, today announced the launch of its first actively managed exchange-traded fund (ETF): the Suncoast Select Growth Fund. Now trading on the New York Stock Exchange (NYSE) under the ticker symbol SEMG, the fund marks a significant milestone for the firm as it expands access to its disciplined investment strategy through a new, investor-friendly vehicle.

SEMG holds a concentrated portfolio of 18 to 22 high-conviction, domestic large-cap growth companies. With a dual objective of capital appreciation and preservation, the strategy targets businesses demonstrating strong earnings growth, consistent free cash flow, robust balance sheets, and durable competitive advantages. Developed and refined over 27 years, the strategy has been managed in a separate account format by Suncoast Equity Management's Founder and Chief Investment Officer, [Donald Jowdy](#), and Senior Vice President and Co-Portfolio Manager, [Amy Lord](#) CFA, for the past 16 years.

"The launch of SEMG marks an exciting new chapter for Suncoast Equity Management," said [Dan McNichol](#), **President of Suncoast Equity Management**. "This ETF allows us to expand access to a time-tested strategy, reaching a wider range of institutional and intermediary partners while staying true to the disciplined approach that has defined our firm for nearly 30 years."

Jowdy and Lord will continue to lead the strategy within the ETF. Both bring deep experience and a consistent long-term approach to portfolio management that emphasizes rigorous bottom-up research and risk-conscious decision-making. The ETF structure offers key benefits to investors, including daily liquidity, tax efficiency, and greater accessibility for individual and institutional investors alike. The fund was developed in partnership with [ETF Architect](#), a leading fund advisory firm that supported the structure and launch of SEMG.

This evolution to an ETF format was a natural next step, driven by growing interest among key intermediary relationships. By responding to this demand, Suncoast Equity Management reaffirms its long-standing investment philosophy while embracing a structure aligned with modern portfolio construction and broader client access.

“As ETFs continue to become a core component of financial advisors’ portfolio construction, this launch helps deepen our ability to serve both existing and future clients,” added **McNichol**.

This launch supports a broader strategic evolution at Suncoast, which has grown its institutional intermediary business from \$200 million to over \$1 billion in assets under management (AUM) and assets under advisement (AUA) over the last five years, bringing total firm assets to approximately \$1.8 billion. Today, the firm partners with several nationally recognized financial institutions across wealth management and banking, leveraging those relationships to deliver tailored investment solutions at scale.

For more information about SEMG, including the prospectus, investment details, and how to invest, please visit www.suncoastequityetf.com. You can also learn more about Suncoast Equity Management at suncoastequity.com.

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About Suncoast Equity Management

Founded in 1997, Suncoast Equity Management is a Tampa-based investment management firm specializing in long-term portfolio strategies and comprehensive wealth planning. Through its proprietary Disciplined Investment System (SEM-DIS), Suncoast Equity Management delivers consistent, research-driven results for individuals, families, and institutional partners. With a commitment to transparency, partnership, and performance, Suncoast Equity Management helps clients build and preserve lasting wealth. To learn more, please visit www.suncoastequity.com.

IMPORTANT INFORMATION

An investment in the Fund involves risk. There is no assurance that the Fund will achieve its investment objective. An investor may lose money by investing in the Fund. Following are the principal risks of investing in the Fund.

Large-Capitalization Companies Risk. The stock of large-capitalization companies may trail the returns of the overall stock market, both in the long and short term.

Growth Investing Risk. The stock of growth companies may be more volatile than other types of investments, both in the long and short term.

Value Style Investing Risk. Investing in value stocks presents the risk that the stocks may not achieve their full market value.

Mid-Capitalization Companies Risk. Investing in the stock of mid-capitalization companies involves greater risk, generally, than that associated with investing in larger, more established companies. The stock may be more volatile and less liquid, and be more sensitive to changing market conditions.

New Fund Risk. The Fund is a recently organized investment company with no operating history. As a result, investors have no track record or history on which to base their investment decisions.

The Suncoast ETFs are distributed by Quasar Distributors, LLC.