

Ferguson-Johnson Wealth Management affirms Dimensional's Investment Philosophy after firm tops 'Best Fund Families' list

Ferguson-Johnson Wealth Management Affirms Commitment to Dimensional's Investment Philosophy After Firm Ranks #1 on Barron's "Best Fund Families"

ROCKVILLE, MARYLAND, UNITED STATES, May 8, 2023 /EINPresswire.com/ -- [Ferguson-Johnson Wealth Management](#) is proud to announce the No. 1 ranking of its long-term strategic partner, Dimensional Fund Advisors (DFA), in Barron's "Best Fund Families of 2022" list. [Dimensional Funds](#) rose from fifth place in last year's survey to claim the first place position this year.

Dimensional is ranked 17th in Barron's "5-year ranking" of fund families and 7th in its 10-year list, including the longest time horizon. The recognition is based on the one-year estimate of how each firm's actively managed funds have performed compared to their peers based on data from Refinitiv Lipper.

To qualify for the ranking, firms must offer a minimum number of funds across several categories, including general U.S. stock, world equity, and mixed-asset. They must also offer taxable bonds and national tax-exempt bond funds. The ranking also includes "smart beta" ETFs, reflecting each firm's active-management ability.

DFA, a \$584 billion firm, demonstrates a strong track record of delivering reliable outcomes for clients and investors through their academic research and data-driven investment strategies, particularly in factor investing.

DFA's ability to closely monitor equity premiums through daily price information and identify buying opportunities when growth stocks shift into value territory, combined with their reliance on factors such as momentum, were highlighted as key reasons for their success. This recognition underscores the firm's commitment to academic research and data-driven investment philosophy, and further solidifies their position as a leader in factor investing.

Dimensional has helped investors pursue higher expected returns through advanced portfolio design, management, and trading for over 40 years. Bryce Skaff, Co-Head of DFA's Global Client Group, highlighted the company's consistent approach to designing and managing investment portfolios, and their continued pursuit of long-term drivers of expected returns to deliver reliable outcomes for clients and investors.

"Ferguson-Johnson Wealth Management is proud to be part of a select group of [fee-only financial advisory](#) firms that shares Dimension's investment philosophy." said Derek Johnson, CRPC®, Principal and Director of the firm. "This shared investment philosophy is based on a core belief in fairly priced securities, essential diversification, and trading off risks and costs with expected returns, all with the aim of ensuring that clients can benefit from superior investment solutions."

He further added "As a trusted financial advisor, Ferguson-Johnson Wealth Management is proud to work with Dimensional Funds, a firm with a strong track record of delivering reliable outcomes for its clients and investors. We are confident that our continued employment of Dimensional Fund solutions enable us to provide even greater value to our clients and help them achieve their financial goals."

About Dimensional Funds:

Dimensional Funds is a global investment firm that has been committed to delivering innovative investment solutions to clients for over 40 years. The firm is known for its unique approach to investing, which combines rigorous academic research, advanced technology, and a deep understanding of capital markets. With 14 global offices and over \$500 billion in assets under management, Dimensional Funds is one of the world's largest investment management firms.

About Ferguson-Johnson Wealth Management

Ferguson-Johnson Wealth Management is a fee-only financial advisory firm that provides comprehensive financial planning and investment management services to individuals, families, and small businesses. The firm's mission is to help its clients achieve their financial goals through personalized advice and a disciplined investment process.

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