

**UNITED STATES
SECURITIES AND EXCHANGE COMMISSION**
Washington, D.C. 20549

FORM 8-K

**CURRENT REPORT
PURSUANT TO SECTION 13 OR 15(D)
OF THE SECURITIES EXCHANGE ACT OF 1934**

March 2, 2026
Date of report (Date of earliest event reported)



SEI INVESTMENTS COMPANY
(Exact name of registrant as specified in charter)

Pennsylvania
(State or Other Jurisdiction
of Incorporation)

0-10200
(Commission
File Number)

23-1707341
(I.R.S. Employer
Identification No.)

1 Freedom Valley Drive
Oaks, Pennsylvania 19456
(Address of Principal Executive Offices and Zip Code)

(610) 676-1000
(Registrants' Telephone Number, Including Area Code)

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions:

- Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

<u>Title of each class</u>	<u>Trading Symbol</u>	<u>Name of each exchange on which registered</u>
Common Stock, par value \$0.01 per share	SEIC	The NASDAQ Stock Market LLC

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§240.12b-2 of this chapter).

Emerging growth company

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

Item 7.01. Regulation FD Information.

SEI Investments Company (the "Company"), is furnishing its Raymond James Institutional Investor Conference presentation issued on March 2, 2026 as Exhibit 99.1 to this Current Report on Form 8-K.

As provided in General Instruction B.2 to Form 8-K, the information furnished pursuant to Item 7.01 and Exhibit 99.1 hereof shall not be deemed "filed" for purposes of Section 18 of the Securities Exchange Act of 1934, as amended, nor shall it be deemed incorporated by reference in any filing with the Securities and Exchange Commission, except as shall be expressly provided by specific reference in such filing.

This Current Report on Form 8-K and the Exhibit hereto contains forward-looking statements within the meaning or the rules and regulations of the Securities and Exchange Commission. In some cases you can identify forward-looking statements by terminology, such as "may," "will," "expect," "believe," "remain" and "continue" or "appear." Our forward-looking statements include our current expectations as to:

- our ability to maintain our sales momentum;
- how we are reshaping our operating model, deepening client engagement and relationships, strengthening our talent, and sharpening our strategic vision, if at all;
- our ability to generate earnings growth, sales events, and returns to our shareholders;
- the evolution of our go-to-market strategy;
- our ability to serve the world's most sophisticated institutional, wealth, and asset management organizations;
- our strategic priorities and our ability to execute against these priorities;
- the strength of our position to address current and future uncertainties;
- the impacts of market uncertainty;
- the nature and scope of asset management products we will launch;
- our ability to deliver sustained, long-term growth and shareholder value;
- the demand for our products and services;
- the headwinds that may affect our businesses;
- the opportunities available to us for growth and to gain share in the markets in which we currently, and seek to, participate;
- the performance of our various businesses, including the margins and profitability of such businesses and the events that may affect the margins, profitability and growth prospects of these businesses;
- The drivers of future revenue, margin and earnings growth;
- the benefits, if any, that we or our clients may derive from acquired assets;
- the strength and elements of our balance sheet;
- the strength of our pipelines and the momentum that each may have;
- our run rate and the stability of the elements of that run rate;
- our commitment to returning annual cash flow to shareholders and the percentage of this cash flow that may be returned;
- the resiliency of our business; and
- the market dynamics affecting our businesses.

You should not place undue reliance on our forward-looking statements, as they are based on the current beliefs and expectations of our management and subject to significant risks and uncertainties, many of which are beyond our control or are subject to change. Although we believe the assumptions upon which we base our forward-looking statements are reasonable, they could be inaccurate. Some of the risks and important factors that could cause actual results to differ from those described in our forward-looking statements can be found in the "Risk Factors" section of our Annual Report on Form 10-K for the year ended Dec. 31, 2025, filed with the Securities and Exchange Commission. We do not undertake to update any of our forward-looking statements.

Item 9.01. Financial Statements and Exhibits.

<u>Exhibit No.</u>	<u>Description</u>
99.1	Raymond James Institutional Investor Conference presentation issued March 2, 2026
104	Cover Page Interactive Data File (embedded within the Inline XBRL document)

SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

SEI INVESTMENTS COMPANY

Date: March 2, 2026

By: /s/ Sean J. Denham
Sean J. Denham
Chief Financial and Chief Operating Officer



SEI Investments.

Ryan Hicke, CEO

Raymond James Institutional Investor Conference
March 2, 2026

Safe Harbor Statement

This presentation contains forward-looking statements within the meaning or the rules and regulations of the Securities and Exchange Commission. In some cases you can identify forward-looking statements by terminology, such as "may," "will," "expect," "believe," "remain" and "continue" or "appear." Our forward-looking statements include our current expectations as to:

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Past performance does not guarantee future results.

Leveraging SEI's unique competitive position



SEI's business evolution

Legacy → Inflection → Future

2017 to 2022

7%

Avg. annual
EPS growth
2017 to 2022

24%

Consolidated
operating margin
2022

\$364M

Avg. annual
share repurchases
2017 to 2022

\$69M

Total net
sales events
2022

-14%

Avg. annual total
shareholder return
2017 to 2022

2022 to today

18%

Avg. annual
EPS growth
2022 to 2025

27%

Consolidated
operating margin
2025

\$616M

Total share
repurchases
2025

\$150M

Total net
sales events
2025

46%

Avg. annual total
shareholder return
2022 to 2025

"SEI 2025 to 2030"

**Continued
momentum**

Earnings per share

Net sales events

Consolidated
operating margins

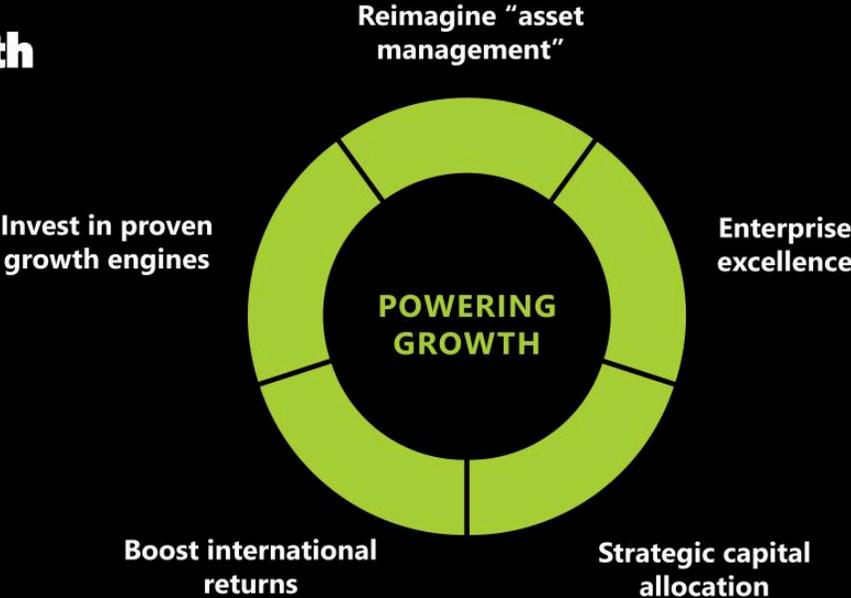
90-100%

Combined dividend
and share repurchases
% of free cash flow

**Double-
digit**
Average
annual TSR

Total shareholder return calculated using FactSet, assuming reinvestment of dividends

SEI's path to accelerating growth





Grow the core



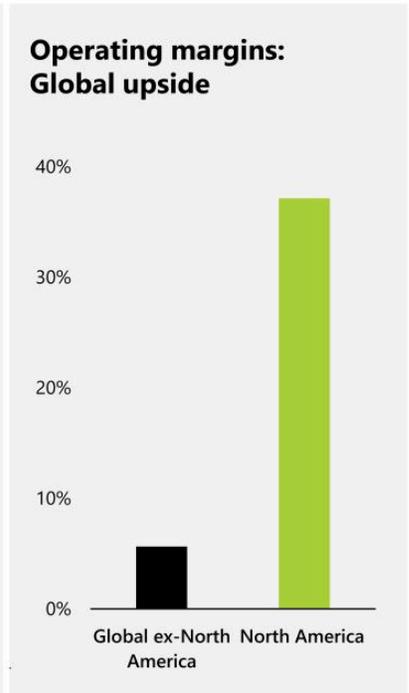
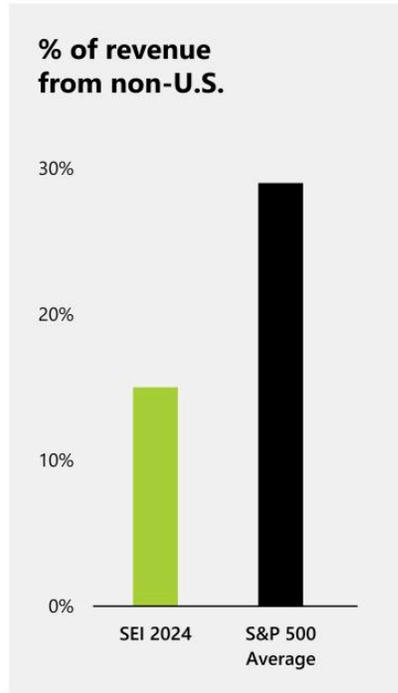
Move up market



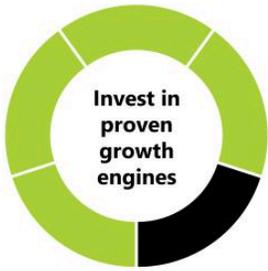
Grow wealth management capability



Significant margin upside within global business



Source: 2023 S&P Global Market Intelligence analysis



**Capitalize on
existing strengths**

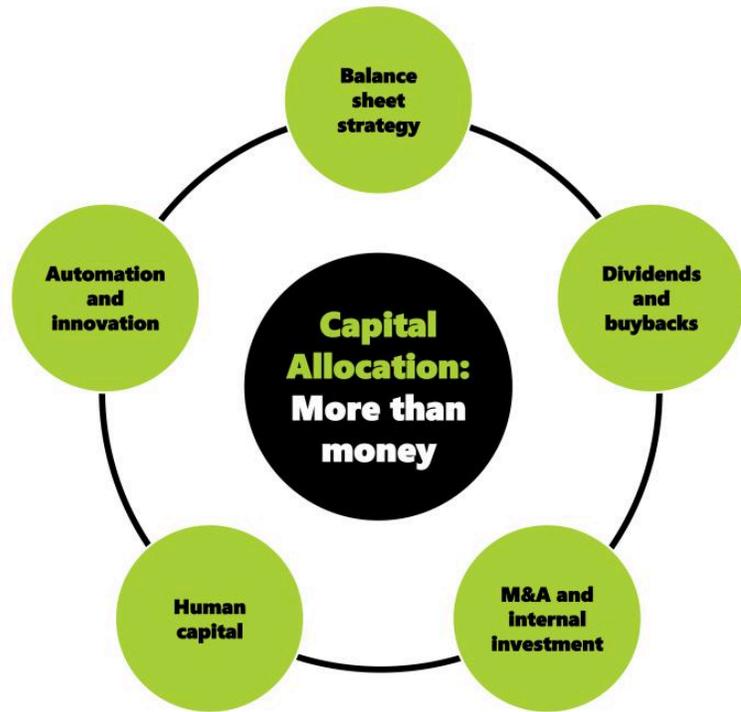


**Expand initiatives
that drive
operational gains**





**Smart use of capital
against growth
opportunities**





AI risks and opportunities... let's talk about it

Questions?

Raymond James
Institutional Investor Conference



