Introducing Canvas

Dear OSAM Investors, Shareholders, Friends, and Future Clients—

Today, I am excited to announce the release of the Canvas™ platform, the first investing software that allows advisers and allocators to design, implement, and maintain deeply customized investment strategies. Building on our team's 2+ decades of expertise in factor and systematic strategy design, Canvas hands allocators the keys to our best systems so they can design tailored strategies for their clients.

Using the Canvas Portfolio Builder is like designing a car online. Every choice you make is simple and gives you instant feedback. You design the strategies, and we implement them in separate accounts at your preferred custodian. All trading is handled by OSAM's team.

Customization is so important because of the possibilities it unlocks. In addition to tailoring your asset class, index, and factor exposures, with Canvas, you can now easily accomplish these jobs for the first time, all in one place:

- Help reduce clients' key risk exposures to single stocks or in their personal earnings stream.
- Adjust for client tastes. Eliminate stocks and/or industries they dislike.
- Use thematic restrictions to remove companies they feel are important to avoid.
- Improve after-tax returns by creating valuable tax losses to offset client gains. Choose how aggressively you want to generate losses for every client and change their settings at any time.
- Create better investor behavior by providing portfolios uniquely mapped to their lives.

Canvas is built with the allocator's business in mind, so you can accomplish the following jobs:

- Trading, rebalancing, and cash flows are all handled in Canvas by OSAM—making your firm's operations easier.
- Target the factors and styles you have conviction in by building unique Strategy Templates reflecting your firm's investment philosophy. Use these templates as a starting point for further client customization.
- Work with our Portfolio Architects to run diagnostics on other strategies, funds, or ETFs. Using our X-Ray tool, we can help you better understand your existing portfolio exposures.
- Automatically generate performance reports which show results in traditional and new formats so clients can easily understand what is happening in their portfolios.

"Dimensions of Customization" Built into Canvas

- **Asset Allocation & Rebalancing**
  - *Fixed Income*
  - *Equity Segment: Size & Geography*
- **Better Factor Exposures**
- **Direct Indexing**
- **Sophisticated & Adjustable Tax Loss Harvesting**
- **Position Level Customization**
- **Granular ESG Controls**
- **Fixed Income**
  - *Credit & Duration Control*

To get started, it's often helpful to imagine a specific client or prospect and let us demonstrate what can be built with them in mind. To schedule a conversation or demo with our team, go to canvas.osam.com We will onboard new firms slowly to ensure Canvas is set up as perfectly as possible for your clients.

Give your clients something they cannot find elsewhere—a strategy built uniquely for them.

The investing strategies of the future are customized. Build them on Canvas.

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Chief Executive Officer

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