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## **SMArtX Advisory Solutions Grows its Turnkey Asset Management Platform with 20 New Strategies**

*Industry Heavyweight Janus Henderson Adds 7 Strategies to the Platform*

WEST PALM BEACH, Fla., May 4th, 2022 -- SMArtX Advisory Solutions ("SMArtX"), a leading innovator in unified managed accounts (UMA) technology and architect of the SMArtX turnkey asset management platform ('TAMP'), today announced 20 new investment strategies from 10 asset management firms have been added to its turnkey asset management platform (TAMP). The SMArtX platform now supports 1,033 model-traded and manager-traded separate account strategies offered from a diverse group of 255 asset managers.

SMArtX has added eight new asset management firms —Appleton Partners, Aptus Capital Advisors, Counterpoint Mutual Funds, Janus Henderson, Main Management, Martin Currie, Ned Davis Research, and Spouting Rock Asset Management — to give advisors the customized strategies they need to offer tailored portfolios to clients. These new offerings are distributed and traded by SMArtX through its award-winning cloud-based solution across seven custodial platforms.

“SMArtX is excited to welcome new managers to the platform. The volatility of the markets continues to strain advisors who manage the individual positions within their clients' portfolios,” said Evan Rapoport, CEO of SMArtX Advisory Solutions. “As a result, we see ongoing demand for institutional third-party investment strategies to be on the SMArtX platform so advisors can spend more time focused on their clients.”

Two existing firms are adding new strategies to the platform: Kingsview Investment Management and The London Company. The strategies across the 10 firms encompass emerging markets, global equity, U.S. equity, and fixed income strategies.

The complete list of new strategies include:

- Appleton Partners
  - Intermediate Municipal Bond\*
  - Municipal Impact SMA\*
- Aptus Capital Advisors
  - Impact Series HNW Conservative

- Impact Series HNW Moderate
  - Impact Series HNW Growth
- Counterpoint Mutual Funds
  - High Yield Trend
- Janus Henderson
  - US Concentrated Growth
  - Global Dividend Growth
  - Global Sustainable Equity
  - US Growth & Income
  - US Mid Cap Growth
  - US Mid Cap Value
  - US Opportunistic Alpha
- Kingsview Investment Management
  - Dividend Plus
  - Ambassador Income
- Main Management
  - Active Sector Rotation
- Martin Currie
  - Emerging Markets
- Ned Davis Research
  - Dynamic Allocation
- Spouting Rock Asset Management
  - Small Cap Growth
- The London Company
  - SMID Cap

\* Indicates manager traded SMA only

SMArtX's continued growth is driven by two main applications of its technology: the off-the-shelf TAMP offering, which is built using SMArtX Advisory Solutions' proprietary UMA technology, and the ability to further deploy that tailored UMA technology through APIs to meet the mandates of large enterprises, RIA platforms, and hybrid broker-dealers.

SMArtX President & COO Jonathan Pincus emphasized that “the SMArtX platform continues to overperform on the automation of manual processes. It goes beyond just technology to include the option of accessing a wide range of third-party investment strategies that trade the assets and relieve the burden from the advisor.”

### **About SMArtX Advisory Solutions**

SMArtX Advisory Solutions is an award-winning managed accounts technology provider and manages SMArtX, a turnkey asset management platform (‘TAMP’). SMArtX’s API-first, cloud-native technology operates within a modular, micro-services architecture, providing clients a tailored solution catered to their unique specifications. SMArtX is available as an off-the-shelf TAMP for advisors seeking wider selection of investment product and ease of use, while automating the investment processes and simplifying the everyday tasks of managing client accounts. SMArtX also licenses its proprietary technology to enterprise firms looking to create,

customize, or upgrade their existing managed accounts technology as a standalone or fully integrated solution. SMArtX is the managed account technology and TAMP platform of choice for multiple RIAs, broker-dealers, and asset managers. Learn more at [www.smartxadvisory.com](http://www.smartxadvisory.com)

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