



Fixed Income Leaders Launch YieldX, A Revolutionary Investment and Portfolio Management Platform

Built on a flexible, scalable API-driven technology to fit every business model, platform is powered by artificial intelligence and analytics

Miami, FL – September 15, 2020 — Today marks the launch of [YieldX](#), a new digital, end-to-end platform for fixed income investing. Founded by startup veterans in both the fintech and fixed income space, the platform enables users to easily source and trade fixed income assets, a process that has traditionally required immense resources, time, and in-depth know-how. Through application-based solutions driven by artificial intelligence, YieldX solves for the various complexities associated with sourcing, allocating and trading fixed income assets. The platform was developed to function as either an end-to-end or stand-alone solution, with YieldX Hub (a SaaS offering) and YieldX API, to help registered investment advisors (RIAs), broker-dealers, banks, and fintech companies elevate their fixed income offerings.

The YieldX Hub is a suite of apps that provide financial professionals with the ability to construct custom fixed income portfolios in a matter of seconds. The easy-to-use interface lets users quickly search, sort, filter, and analyze over a million assets – including municipal bonds, corporate bonds, ETFs, and closed-end funds – and create an optimized portfolio for clients to reach a target yield or specific goals. The Hub is launching with three applications:

- **InPaas™** is a portfolio construction tool that optimizes fixed income ETFs and closed-end funds for a desired income or yield target with the lowest risk and expense ratio.
- **BestFit™** is a portfolio construction tool that curates a customized corporate and municipal bond portfolio tailored to best fit your investment goals and preferences.
- **AssetExplorer™** is a robust analytics tool to search, filter, sort and identify fixed income assets to add to a portfolio or watch list.

“Fixed income capabilities like this were previously only accessible to large institutions with teams of analysts and traders, so we are extremely excited to bring YieldX to market and fill this technology gap,” **said Adam Green, CEO of YieldX.** “Throughout my career, I have watched fintech companies make incredible advancements in how people invest in equities, identify appropriate assets, and seamlessly conduct trades. We saw a major opportunity to bring this same level of innovation to fixed income technology, and ensure these types of assets and analytics tools are easily accessible for all.”

YieldX is led by senior fixed income and fintech professionals who have more than 70 years of collective experience at marquee capital markets and technology firms. CEO Adam Green (co-founder of MoneyLion) and President and Chief Innovation Officer Steve Gross (formerly founder and CIO at AlphaParity, acquired by Franklin Templeton) lead a team of 16 entrepreneurs, data scientists and technologists.

“The accelerating trends towards electronic trading and advances in big data and AI have made the impossible possible in fixed income,” **said Steve Gross, YieldX president and Chief Innovation Officer.** “Users can accomplish in seconds what has traditionally taken days or weeks – building a comprehensive fixed income portfolio that meets clients’ individual investment and income goals and can be executed electronically. YieldX provides our partners with the ability to quickly and efficiently scale



their delivery of personalized fixed income portfolios, showcasing additional value to end-clients who have come to expect their values and preferences to be seamlessly integrated into their investment solutions.

To learn more about YieldX, please visit <https://www.yieldx.app>.

About YieldX

YieldX revolutionizes fixed income investing with a 100% digital, end-to-end platform that eliminates time-consuming, manual processes and replaces antiquated technology with a modern interface and reimagined user experience. Powered by advanced risk, optimization and pushbutton portfolio construction technology, YieldX users can build tailored, sophisticated fixed income portfolios across the yield/risk spectrum by answering a few simple questions. As an open API and SaaS platform, YieldX offers complete flexibility, with a choice of end-to-end or stand-alone solutions, custom investment universes, and white-labeled offerings, so clients can select the capabilities that best meet their needs. Headquartered in Miami, FL, YieldX is led by a team of fixed income and fintech professionals with more than 70 years of collective experience. RIAs, broker-dealers, banks, and fintech companies can use YieldX's open API technology to deliver faster and more informed fixed income investment recommendations to clients. For more information, visit <https://www.yieldx.app>.

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