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## Multi-Asset Solutions Leveraging Insights from Professor Jeremy Siegel Now Available on WisdomTree Prime™

*Three new Digital Funds are now available direct-to-consumers through WisdomTree's personal finance app*

NEW YORK--(BUSINESS WIRE)-- WisdomTree, Inc. (NYSE: WT), a global financial innovator, today announced the launch of three new Digital Funds, each leveraging research insights from Professor Jeremy Siegel, Senior Economist to WisdomTree and Emeritus Professor of Finance at The Wharton School of the University of Pennsylvania. These blockchain-enabled funds are exclusively available on [WisdomTree Prime™](#), which is now available to U.S. investors across 36 states.

The new Digital Funds are actively managed and seek long-term capital appreciation using an asset allocation strategy that predominantly invests in exchange traded funds (ETFs), including WisdomTree ETFs, providing WisdomTree Prime users with more options for a curated investing experience covering a wide variety of asset classes all within a blockchain-native ecosystem. WisdomTree's in-house transfer agent keeps a secondary record of investor ownership of Digital Fund shares currently on the Stellar blockchain, with the Ethereum and other blockchains being a focus for the future. The three new Digital Funds join WisdomTree's suite of nine Digital Funds already available through WisdomTree Prime.

- The **WisdomTree Siegel Global Equity Digital Fund (EQTYX)** provides exposure to equity investments (U.S. and international markets, and may include emerging markets).
- The **WisdomTree Siegel Moderate Digital Fund (MODRX)** is designed to follow the traditional 60/40 allocation (*i.e.*, 60% equities/40% fixed income).
- The **WisdomTree Siegel Longevity Digital Fund (LNGVX)** is designed to challenge the more traditional 60/40 allocation by weighting the allocation more toward equities in seeking to address increased longevity as people are generally living longer.

In addition, in generally seeking higher income generation and market outperformance potential, each Digital Fund's allocation to equities focuses on including equities that have historically exhibited higher dividend yields and/or lower valuation ratios.

"My long-standing relationship with WisdomTree has resulted in model portfolios available to financial advisors since 2019, but this is the first time ever that funds constructed with strategies that leverage my research are available direct-to-consumers through WisdomTree Prime," said Professor Jeremy Siegel. "I am pleased WisdomTree is utilizing my research in

the management of these funds."

Professor Siegel has served as a Senior Investment Strategy Advisor to WisdomTree since 2004. His title was elevated to Senior Economist to WisdomTree in 2023 to reflect a deepened commitment as a result of continued collaboration and an aligned vision on long-term investing strategies focused on equities. As Senior Economist, Professor Siegel provides consultation and information to WisdomTree regarding his academic research, including as it relates to global financial markets, the global economic environment, monetary policy, and interest rates, among other services. Professor Siegel does not have any day-to-day responsibilities with respect to any WisdomTree Siegel Digital Fund.

"We are thrilled that insights from Professor Siegel, a world-renowned expert on the economy and financial markets, are being leveraged in the blockchain-enabled ecosystem for the very first time," said Will Peck, Head of Digital Assets at WisdomTree. "We believe that blockchain is the future of finance and are proud to provide WisdomTree Prime users with now twelve Digital Funds that offer traditional exposures within a digital wrapper. Many on Wall Street have their eyes on tokenization and unlocking use cases through blockchain – and WisdomTree is leading the industry evolution by making these products available to investors today."

For more information about the WisdomTree Digital Funds, please visit [www.wisdomtree.com/investments/digital-funds](https://www.wisdomtree.com/investments/digital-funds).

Access to WisdomTree Digital Funds is offered through WisdomTree Prime™, which is available in the [Apple App Store](#) and [Google Play](#) for users across 36 states in the U.S. Please visit <https://www.wisdomtreeprime.com/> for the latest information on availability.

## **About WisdomTree**

WisdomTree is a global financial innovator, offering a well-diversified suite of exchange-traded products (ETPs), models, solutions and products leveraging blockchain-enabled technology. We empower investors and consumers to shape their future and support financial professionals to better serve their clients and grow their businesses. WisdomTree is leveraging the latest financial infrastructure to create products that provide access, transparency and an enhanced user experience. Building on our heritage of innovation, we are also developing and have launched next-generation digital products, services and structures, including digital or blockchain-enabled mutual funds and tokenized assets, as well as our blockchain-native digital wallet, WisdomTree Prime™.\*

\*The WisdomTree Prime digital wallet and digital asset services are made available through WisdomTree Digital Movement, Inc. (NMLS ID: 2372500), in select U.S. jurisdictions and may be limited where prohibited by law. Visit [www.wisdomtreeprime.com](https://www.wisdomtreeprime.com) or the WisdomTree Prime mobile app for more information. Foreside Fund Services, LLC, (FFS) is not affiliated with WisdomTree, Inc. and its subsidiaries. FFS does not provide digital wallet or digital asset services.

WisdomTree currently has approximately \$100 billion in assets under management globally.

For more information about WisdomTree and WisdomTree Prime, visit: <https://www.wisdomtree.com>.

Please visit us on X, formerly known as Twitter, at @WisdomTreeNews.

WisdomTree® is the marketing name for WisdomTree, Inc. and its subsidiaries worldwide.

**PRODUCTS AND SERVICES AVAILABLE VIA WISDOMTREE PRIME:  
NOT FDIC INSURED | NO BANK GUARANTEE | NOT A BANK DEPOSIT | MAY LOSE  
VALUE | NOT SIPC PROTECTED | NOT INSURED BY ANY GOVERNMENT AGENCY**

The products and services available through the WisdomTree Prime app are not endorsed, indemnified or guaranteed by any regulatory agency.

### **WisdomTree Siegel Digital Funds – Important Information**

**Carefully consider the investment objectives, risks, charges, and expenses of the Digital Funds before investing. To obtain a prospectus containing this and other important information, please visit <https://www.wisdomtree.com/investments>. Read the prospectus carefully before investing.**

**Professor Siegel does not have any day-to-day responsibility with respect to any WisdomTree Siegel Digital Fund** (each, a “Digital Fund”). Each Digital Fund’s asset allocation is constructed by the adviser, WisdomTree Digital Management, Inc., and implemented by a sub-adviser. In constructing each Digital Fund’s asset allocation, in addition to leveraging the insights and research of Professor Siegel, the adviser will leverage research and asset allocation models constructed and maintained by WisdomTree, Inc. or other affiliates of the adviser. Reference to “blockchain enabled” is meant to reflect the fact that each Digital Fund uses blockchain technology. The Digital Funds will not invest in cryptocurrencies.

**A blockchain is an open, distributed ledger that digitally records transactions in a verifiable and immutable (i.e., permanent) way using cryptography. A distributed ledger is a database in which data is stored in a decentralized manner. Cryptography is a method of storing and transmitting data in a particular form so that only those for whom it is intended can read and process it. A blockchain stores transaction data in “blocks” that are linked together to form a “chain”, and hence the name blockchain.**

There are risks associated with investing, including possible loss of principal. Because each Digital Fund is new, it has no performance history. Blockchain technology is a relatively new and untested technology, with little regulation. Blockchain systems could be vulnerable to fraud, particularly if a significant minority of participants colluded to defraud the rest. Potential risks also include vulnerability to theft, or inaccessibility, and future regulatory developments could affect its viability. Each Digital Fund’s investment performance and risks will be directly related to the investment performance and risks of underlying funds, which are ETFs that each Digital Fund invests in, such as: the trading prices of equity securities fluctuate in response to a variety of factors, such as economic, financial or political events that impact the entire market, market segments, or specific issuers. The types of equity securities in which an applicable Digital Fund may provide relatively lower returns than those of other securities. For the Global Equity Digital Fund, investments in non-U.S. securities involve political, regulatory, and economic risks that may not be present in U.S. securities. Fixed income securities that an applicable Digital Fund may invest in via ETFs are subject to interest rate, credit, inflation, and reinvestment risks. As interest rates rise, the

value of fixed-income securities fall. Each Digital Fund is actively managed using proprietary investment strategies and processes. There can be no guarantee that these strategies and processes will be successful or that a Digital Fund will achieve its investment objective. In investing in WisdomTree ETFs as part of each Digital Fund's asset allocation strategy, the adviser and sub-adviser are subject to potential conflicts of interest, including an incentive to allocate investments to the WisdomTree ETFs in order to generate additional fees for themselves or their affiliate.

Cybersecurity attacks affecting a Digital Fund's third-party service providers, the mobile phone application used to transact in Digital Fund shares, blockchain network, or the issuers of securities in which the Digital Fund invests may subject the Digital Fund to many of the same risks associated with direct cybersecurity breaches.

WisdomTree Digital Funds are distributed by Foreside Fund Services, LLC. Foreside is not affiliated with WisdomTree, WisdomTree Prime, WisdomTree Digital Trust nor any entity mentioned in the press release.

### **WisdomTree Prime – Important Information**

Although WisdomTree Transfers, Inc., the Fund's transfer agent, will maintain the official record of share ownership in book-entry form, the ownership of a Digital Fund's shares will also be recorded – or digitized – on the Stellar other blockchains. In order to facilitate the use of blockchain technology, a potential shareholder must have a blockchain wallet. WisdomTree Digital Movement, Inc. ("WisdomTree Digital", as further described below) provides a hosted Stellar-based wallet through the mobile application, WisdomTree Prime. Through the app, Digital Fund investors may purchase, hold, sell or transfer their shares. WisdomTree Securities, Inc., an affiliate of WisdomTree Transfers and WisdomTree Digital, facilitates the ability for Digital Fund investors on an "application-way" basis to purchase or sell Digital Fund shares through the App. Brokerage commissions apply.

The information herein, including references to "curated" (which refers to the limited types of assets available within the WisdomTree Prime app), should not be relied on and is not a substitute for the skill, judgment and experience of the user when making investment and other business decisions. All Information is impersonal and not tailored to the needs of any person, entity or group of persons. None of the information constitutes an offer to sell or a solicitation of an offer to buy, any security or other asset, financial product or other investment vehicle or any trading strategy.

### **Cautionary Statement Regarding Forward-Looking Statements**

This press release may contain a number of "forward-looking statements" as defined in the Private Securities Litigation Reform Act of 1995. These forward-looking statements include, but are not limited to, statements about WisdomTree's ability to achieve its financial and business plans, goals and objectives, including with respect to its ability to successfully implement its strategy relating to digital assets and blockchain-based financial services, including WisdomTree Prime™, and other risk factors discussed from time to time in WisdomTree's filings with the Securities and Exchange Commission ("SEC"), including those factors discussed under the caption "Risk Factors" in its most recent annual report on Form 10-K, filed with the SEC on February 28, 2023, and in subsequent reports filed with or furnished to the SEC. These forward-looking statements are based on WisdomTree's

management's current expectations, estimates, projections and beliefs, as well as a number of assumptions concerning future events. These forward-looking statements are not guarantees of future performance, conditions or results, and involve a number of known and unknown risks, uncertainties, assumptions and other important factors, many of which are outside WisdomTree's management's control, that could cause actual results to differ materially from the results discussed in the forward-looking statements. Forward-looking statements included in this release speak only as of the date of this release. WisdomTree does not undertake any obligation to update its forward-looking statements to reflect events or circumstances after the date of this release except as may be required by the federal securities laws.

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