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WisdomTree Celebrates 20 Years of Innovation and Global Growth

From ETF Pioneer to a Modern Financial Platform Built for the Future of Investing

NEW YORK--(BUSINESS WIRE)-- WisdomTree, Inc. (NYSE: WT), a global financial innovator, today celebrates its 20-year anniversary, marking two decades of challenging industry conventions, expanding investor access, and building a diversified modern asset management platform designed for the future of finance.

On June 16, 2006, WisdomTree launched its first 20 exchange-traded funds (ETFs) with a differentiated approach to index construction and portfolio design. Rather than simply replicating market capitalization-weighted indexes, WisdomTree introduced fundamentally weighted and income-focused strategies designed to combine the efficiency of passive investing with active insights — an approach the firm described as Modern Alpha[®].

Over the past 20 years, WisdomTree has evolved from an ETF pioneer into a diversified global financial platform spanning exchange-traded products (ETPs), models and SMA strategies, private market solutions, and tokenized and blockchain-enabled financial products. Today, the firm serves investors and financial professionals globally through a growing suite of differentiated investment solutions built on modern financial infrastructure.

“Twenty years ago, we started WisdomTree with the belief that investors deserved something better — smarter exposures, better structures, more thoughtful portfolio construction, and a firm willing to innovate ahead of where the industry was going,” said Jonathan Steinberg, Founder and CEO of WisdomTree. “That mindset still defines us today, but what’s exciting is how much larger the opportunity has become.”

Steinberg continued, “Our first 17 years were about building the foundation and establishing ourselves as a leader in ETFs. We crossed \$100 billion in assets under management during that period. Over the last three years alone, we have added another approximately \$75 billion in AUM, reflecting accelerating momentum across the business and the broadening of our platform.”

“Today, we have more ways to win than at any point in our history,” Steinberg added. “We are innovating across ETPs, active solutions, models and SMAs, digital assets, tokenization, and private assets within the ETF wrapper. We are no longer simply participating in the evolution of asset management — we are helping drive it.”

WisdomTree’s growth and evolution over the last two decades have been supported by strategic investments designed to diversify capabilities, expand client reach, and position the firm at the intersection of asset management and financial technology.

Over the Last 20 Years, WisdomTree Has Expanded Its Capabilities Through:

- **Strategic Growth and Diversification**
 - Expanding into private markets through the [acquisition of Ceres Partners](#), a premier U.S. farmland investment manager and family farmer partner
 - Enhancing active ETF, derivatives, and defined outcome capabilities through the [acquisition of Atlantic House](#)
 - Expanding WisdomTree's [Models and Portfolio Solutions](#) platform and deepening adviser relationships globally
 - Broadening product capabilities across active, thematic, fixed income, leveraged, and alternatives strategies
- **Digital Assets and Modern Financial Infrastructure**
 - Advancing blockchain-enabled financial services and tokenized real-world asset initiatives
 - Expanding access to tokenized products through [WisdomTree Connect™](#) and [WisdomTree Prime®](#)
 - Positioning WisdomTree to become a leader in [onchain registered funds](#) and next-generation financial infrastructure
 - [Building capabilities](#) designed to bridge traditional finance and decentralized financial ecosystems
- **People, Culture, and Global Scale**
 - Building a culture rooted in innovation, collaboration, accountability, and entrepreneurial thinking
 - Supporting employees through a flexible, outcome-driven Work Smart culture focused on performance, growth, and wellness
 - Expanding global teams dedicated to serving investors and financial professionals worldwide

While WisdomTree's business has evolved significantly over the past two decades, the firm's focus remains consistent: delivering differentiated investment solutions while continually expanding access, innovation, and client outcomes.

"We are leveling up as a firm," said Steinberg. "We are stronger, more diversified, more global, and more strategically positioned than ever before. What began as an ETF innovator has evolved into a fierce global competitor and a force to be reckoned with across asset management."

"The best is yet to come," Steinberg concluded. "We believe the next decade of investing will look dramatically different than the last, and WisdomTree is being built for that future. We intend to continue responsibly pushing boundaries, expanding access, embracing new technologies, and helping investors navigate change with clarity, efficiency, and confidence."

About WisdomTree

WisdomTree is a global financial innovator, offering a diverse suite of exchange-traded products (ETPs), models and solutions, private market investments and digital asset-related products. Our offerings empower investors to shape their financial future and equip financial professionals to grow their businesses. Leveraging the latest financial infrastructure, we create products that emphasize access and transparency and provide an enhanced user experience. Building on our heritage of innovation, we offer next-generation digital products

and services related to tokenized real world assets and stablecoins, as well as our institutional platform, WisdomTree Connect™, and blockchain-native digital wallet, WisdomTree Prime®*, and have expanded into private markets through the acquisition of Ceres Partners' U.S. farmland platform.

* The WisdomTree Connect institutional platform and WisdomTree Prime digital wallet and digital asset services are made available through WisdomTree Digital Movement, Inc., a federally registered money services business, state-licensed money transmitter and financial technology company (NMLS ID: 2372500) or WisdomTree Digital Trust Company, LLC, and may be limited where prohibited by law. WisdomTree Digital Trust Company, LLC is chartered as a limited purpose trust company by the New York State Department of Financial Services to engage in virtual currency business. Visit <https://wisdomtreeconnect.com>, <https://www.wisdomtreeprime.com> or the WisdomTree Prime mobile app for more information.

WisdomTree currently has approximately \$164.8 billion in assets under management globally, inclusive of assets managed by Ceres Partners, LLC as of the last reportable period.

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

Please visit us on X at @WisdomTreeNews.

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

PRODUCTS AND SERVICES AVAILABLE VIA WISDOMTREE CONNECT AND 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 WisdomTree Connect and the WisdomTree Prime app are not endorsed, indemnified or guaranteed by any regulatory agency.

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