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# WisdomTree and Halo Investing Collaborate to Launch First-of-its-Kind Defined Outcome SMA Strategy, Expanding Access to Innovative Advisor Solutions

*Firms officially launch the Halo-WisdomTree Structured Income Strategy, designed to deliver income, downside protection and scalable portfolio solutions for advisors navigating today's markets*

NEW YORK & CHICAGO--(BUSINESS WIRE)-- WisdomTree, Inc. (NYSE: WT), a global financial innovator, and Halo Investing, Inc. ("Halo") today jointly announced the official launch of the Halo-WisdomTree Structured Income Strategy, a first-of-its-kind defined outcome separately managed account (SMA) strategy designed to deliver income, enhance risk-adjusted returns, and provide buffered downside protection.

The launch reflects WisdomTree's continued expansion of its solutions platform beyond traditional ETFs, building scalable model portfolio and SMA strategy capabilities to offer differentiated tools for financial advisors across market cycles.

Defined outcome strategies represent one of the fastest-growing segments of the wealth management landscape, as advisors increasingly seek tools that balance equity market participation with defined risk parameters. WisdomTree views this space as a meaningful opportunity for both product innovation and long-term AUM growth, particularly as advisors shift toward holistic portfolio construction frameworks.

Leveraging WisdomTree's asset allocation expertise and Halo's structured note capabilities, the strategy is calibrated quarterly using WisdomTree Asset Management, Inc.'s model portfolio alongside Halo's income-focused structured notes. The result is a sophisticated, outcome-oriented solution that mirrors an institutionally managed ETF-based model portfolio while incorporating built-in yield enhancement and principal protection features.

"Our collaboration with Halo marks another important step in expanding our solutions platform for financial advisors," said Jeremy Schwartz, Global Chief Investment Officer at WisdomTree. "In an environment where investors are seeking income and greater resilience, this strategy is designed to help advisors pursue more consistent outcomes while managing risk. It also represents continued progress in scaling our broader solutions business and driving sustained organic growth."

The Halo-WisdomTree Structured Income Strategy is managed by Dennis Monohan, Head

of Investment Solutions at Halo, with strategic allocation and model portfolio guidance from Joe Tenaglia, Director of Model Portfolios at WisdomTree. The strategy invests across U.S., international, and emerging markets and is available as an SMA exclusively through the Halo platform.

“This defined outcome strategy helps advisors solve for clients seeking income while managing equity exposure,” said Monohan. “Collaborating with WisdomTree allows us to combine structured note innovation with institutional asset allocation expertise, giving advisors confidence in a category that has historically been less accessible.”

The Halo-WisdomTree Structured Income Strategy adds to a series of innovative offerings from WisdomTree, spanning ETFs, model portfolios, SMA strategies, private asset exposure, and digital asset products. This continued cadence of product innovation reflects WisdomTree’s multi-year strategy to diversify revenue streams, deepen advisor engagement, and drive sustainable AUM growth across market environments.

Separately, WisdomTree has continued expanding its presence in the SMA marketplace, including its recent collaboration with Quorus Inc. to provide WisdomTree’s investment strategies in a tax-efficient SMA format. Together, these efforts broaden how advisors can access WisdomTree’s capabilities across multiple portfolio structures.

As demand for defined outcome and risk-managed solutions continues to grow, WisdomTree remains focused on partnering with leading technology providers to expand advisor access to differentiated, scalable portfolio tools.

For more information, please visit [www.haloinvesting.com](http://www.haloinvesting.com).

**Investing involves risks, including the possible loss of principal.**

## **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 \$156.5 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.

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

### **About Halo Investing**

Founded in 2015, Halo Investing is an award-winning wealth management technology solution that disrupts the way protective and defined outcome investment solutions are used worldwide. Headquartered in Chicago, with an office in Abu Dhabi, Halo is democratizing access to investment solutions such as Structured Notes that were previously unavailable to most investors. Halo has received a growing number of honors and was recently named one of *Fast Company's* Ten Most Innovative Companies. For more information, please visit: <http://www.haloinvesting.com>.

*Halo Investing, Inc. is a parent company of Halo Securities, LLC. Halo Investing, Inc. is not a broker/dealer. Securities offered through Halo Securities, LLC, an SEC registered broker/dealer and member of FINRA/SIPC. Halo Securities, LLC is affiliated with Halo Investing Insurance Services, LLC and Halo Investment Services, LLC. Halo Securities, LLC acts solely as distributor/selling agent and is not the issuer or guarantor of any structured note products. For more information about Halo Securities, LLC, you can visit <https://brokercheck.finra.org/firm/summary/279029>. For more information about Halo Investment Services, LLC, you can visit <https://adviserinfo.sec.gov/firm/summary/325613>*

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