

Investment advisors like you serve a sophisticated array of clients in an environment that is constantly evolving in complexity and risk. The "one-size-fits-all" solutions are often not sufficient for clients to achieve their financial goals. Julex Capital offers customized investment solutions that clients need to navigate fast moving, volatile markets. We are dedicated to building lasting relationships with financial advisors by providing ongoing investment support and research to help enhance the client experience.

### HOW CAN JULEX HELP YOU?

#### *Customized Investment Solutions and Proprietary Strategies*

- ❖ Customized investment solutions tailored to your needs
  - Risk-based portfolio solutions
  - Goal-based portfolio solutions
- ❖ Tactical asset allocation strategies
- ❖ Alpha-oriented quantitative equity strategies
- ❖ Income Solutions
- ❖ ESG Investments
- ❖ Option overlay strategies

#### *Ongoing Support*

- ❖ Access to weekly investment webinar
- ❖ Monthly market and portfolio commentary
- ❖ Monthly investment and performance updates
- ❖ Monthly Macro Chart Book
- ❖ Quarterly Performance Review
- ❖ Access to Investment Team Members

### INVESTMENT TEAM

Julex investment team, with strong academic backgrounds and extensive investment experiences, is dedicated to providing timely responses to the needs of advisors and information on the portfolios and markets.



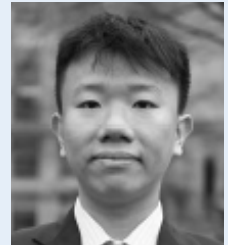
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