

## Xponance at 25: Sourcing Investment Excellence Through Diverse & Emerging Investment Firms and Professionals

*Firm reflects on its legacy, alternatives expansion, growth opportunities and community engagement as a stronger, post pandemic manager*

PHILADELPHIA – 20 May 2021 – Xponance, Inc., a multi-strategy investment firm, is [celebrating its 25<sup>th</sup> year](#) in the asset management industry with an optimistic outlook for the future.

The \$12 billion\* investment firm continues its long legacy as a pioneering supporter of Emerging & Diverse Managers and professionals through its Multi-Manager Platform (MMP), direct equity and fixed Income investment capabilities, with plans to offer alternatives capabilities in the near term.

The firm, with its mission to source alpha from talented and diverse investment professionals, has proven to be a durable and important “force-multiplier” for broadened access in the asset management industry. To date, and through the MMP, Xponance has placed client assets in more than 190 investment strategies, over 60% of which have been offered by diverse and / or women owned investment firms.

On a direct basis, the firm is amongst the very few authentically diverse managers offering quantitative active and passive equity index strategies, and truly differentiated “Yield Advantaged” fixed income solutions. Furthermore, as a value-added solutions partner, the firm’s technology subsidiary, Aapryl, offers software that empowers clients with enhanced manager selection, portfolio construction, and risk management tools.

“It continues to be my great privilege to help our clients meet their investment goals by sourcing the expertise of diverse and emerging firms and professionals” said **Tina Byles Williams**, Xponance Founder and CEO. “I am honored to lead this talented team that has created our collaborative and innovative corporate culture.” True to its founding principles, more than 65% of Xponance’s employee-owners are diverse and / or women. The firm was recognized as *A Best Places to Work in Money Management* for 2020 by P&I Magazine and is a signatory to the United Nations-supported Principles for Responsible Investing.

With an eye to the future, and consistent with the firm’s commitment to create intelligent solutions and deeper relationships, Xponance recently [announced a strategic partnership](#) with global alternatives specialist Investcorp as the firm expands into the alternatives space. Xponance Alts Solutions, and Investcorp Strategic Capital Group, will provide bespoke strategic general partner (GP) staking and seeding capital to diverse, woman-owned, and emerging alternative managers.

This effort is a natural extension of the firm's mission and is in keeping with growing investor interest in alternatives solutions.

This past year the firm successfully rebranded, enjoyed steady and meaningful asset growth across its primary platforms, and hired Head of Distribution & Client Engagement **Len Oremland**, and Head of Alternatives **Marquette Chester**, to spearhead Xponance's next phase of development and growth.

In addition to expanding its business, Xponance also bolstered its charitable work. To recognize its 25<sup>th</sup> Anniversary, Xponance further reaffirms its commitment to community through its **A Good Measure (AGM) Foundation** and employee volunteerism. The firm actively engages with non-profit partners that serve under-resourced and marginalized communities as well as those that educate youth to build leadership skills and financial literacy: Primary support efforts include:

- **Broad Street Ministry** ([broadstreetministry.org](http://broadstreetministry.org)):
  - Provides meals and engagement for vulnerable members of the community; AGM sponsored a week's worth of such meals, along with quarterly lunch service served by Xponance volunteers.
- **Girls Who Invest** ([girlswhoinvest.org](http://girlswhoinvest.org)):
  - Offers education, mentoring and internships for young women seeking careers in the investment industry; Xponance will be hosting a GWI scholar as a summer intern with several firm volunteers serving as ambassador / mentors for the program.
- **Philadelphia Youth Basketball** ([phillyyouthbasketball.org](http://phillyyouthbasketball.org)):
  - Sponsor and mentor inner city youth in the region to reach their potential as students, athletes, and positive leaders; AGM conducts financial literacy and leadership sessions as part of their summer programs.

"The firm's leadership is really pleased that our employees continue to actively step up and help support our communities with the same dedication that they serve clients," said **McCullough Williams, III**, Xponance President & COO.

*\*AUM as of April 1, 2021*

## About Xponance

Xponance, Inc., formerly known as FIS Group, is a Black woman led, and employee-owned investment manager, founded in 1996 by CEO Tina Byles Williams. With over \$12 Billion in assets under management, Xponance is a multi-strategy firm offering Manager of Emerging & Diverse Manager, active and

passive equity, and fixed income with plans for alternative solutions as well. Xponance's technology subsidiary, Aapryl, LLC, offers a web-based analytical platform that assists asset owners in portfolio, manager, and risk due diligence. The company was rebranded to Xponance, Inc. to reflect the full suite of capabilities offered by the firm.

Xponance's primary goal is to be a trusted client solutions partner. The firm's name is derived from the word "exponent" and dually connotes its core objectives—to be a zealous champion for clients; and to provide higher level engagement and a broader array of solutions to meet their investment needs.

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