INTRODUCING THE FACTOR INTELLIGENCE PLATFORM BUILT TO FIT ANY INVESTMENT STYLE

Wolfe Research, a premier research boutique, has partnered with factor-technology leader Omega Point to offer a flexible, easy-to-use factor solution focused on the needs of the modern portfolio manager.

TURNKEY ACCESS TO GLOBAL SECTOR MODELS

EXAMPLES:

TMT

Sample Factors: Subscriber Growth, Book to Bill, Abnormal News Volume.

BANKING

Sample Factors: Net Interest Margin, Capital Adequacy, Credit Risk.

OIL

Sample Factors: Oil Beta, Revenue Per Barrel, Geopolitical Risk.

NON-TRADITIONAL FACTORS

Short Interest, Hedge Fund Concentration (Crowding), Abnormal News Volume.

MACRO OVERLAYS ON TRADITIONAL FACTOR MODELS

Interest Rate Sensitivity, Oil Beta, Geopolitical Risk.

WOLFE RESEARCH'S FACTOR LIBRARY COVERING 350+ FACTORS CAN NOW BE ACCESSED VIA THE OMEGA POINT PLATFORM. COVERAGE INCLUDES INDUSTRY-SPECIFIC MODELS, CUSTOM MACRO MODELS, AND 'NON-TRADITIONAL' MODELS.

The result is unparalleled flexibility that suits any investment strategy - irrespective of sector, style or regional focus.

UNCOVER & MANAGE THE UNIQUE, UNDERLYING DRIVERS OF RISK AND PERFORMANCE IN YOUR COVERAGE UNIVERSE

Access Wolfe Research factor models through Omega Point's PM-workflow optimized UI - providing a seamlessly integrated experience for performance attribution, risk management, and portfolio rebalancing/optimization.

Wolfe Research can further tailor any factor model to match your specifications, and Omega Point includes a robust developer platform that opens up a wide array of customization options.

UNIQUE, AI-DRIVEN PLATFORM HELPS YOU TO:

1. Identify high-alpha stocks to prioritize research
2. Build portfolios that can better isolate fundamental views
3. Rebalance portfolios in step with changing markets
4. Hedge unintended exposure with correlated ETFs or custom baskets
5. Better communicate risks and returns to internal and external stakeholders
6. Present more granular and compelling data when meeting with prospective allocators

WOLFE RESEARCH INSIGHTS

- Hedge vs. market meltdowns
- Banking sector performance
- TMT sector performance
- Corporate filings sentiment
- News sentiment
- Arbitrage
- M&A prediction
- Accounting quality
- Margin reversion
- Interest rate sensitivity
- Top management performance
- Earnings cycle
- Systematic alpha capture

ABOUT OMEGA POINT

Omega Point provides factor-based portfolio solutions to the institutional investment community. Founded by systematic trading professionals, the firm's team of machine-learning PhDs, developers, designers, and market experts have built and honed AI-enabled NextGen portfolio factor solutions adaptive to changing markets. Omega Point is headquartered in San Francisco with additional offices in New York, Austin and Quebec City.

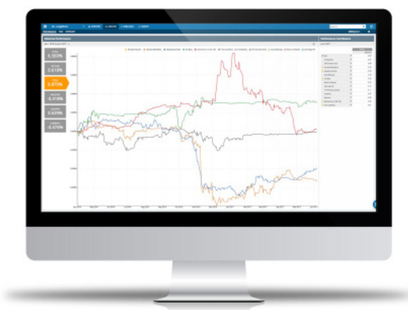
ABOUT WOLFE RESEARCH

Wolfe Research, LLC, is a premier research boutique with an affiliated broker dealer. The firm is committed to the creation of best-in-class product and ongoing strategic growth. Wolfe Research provides bottom up and top down macro and stock specific sector research to its institutional clients. The firm is based in New York, NY with additional offices in Boston, Dallas, San Francisco, Daytona Beach and Stamford.

DISCOVER

Global factor model characterize your portfolio's return and risk across quantifiable signals that are correlated with asset returns.

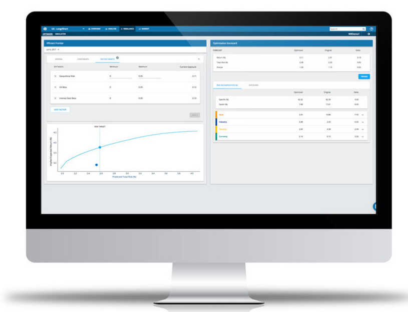
- Discover how style, sector, and region factors drive your portfolio's performance.
- Compare exposures between your portfolio and industry benchmarks.
- Optimize your portfolio based on which factor trends contribute the most to your returns.



ANALYZE & ISOLATE

Omega Point's integration with leading factor model vendors adds hundreds of data sets to calculate factors across all critical dimensions.

- Intuitive factor model analyzes how factors impact volatility.
- Easily drill down to see how each of your positions contributes to factor movement sensitivity.
- Act with a clear understanding of factor risk as it relates to your own, best ideas portfolio.



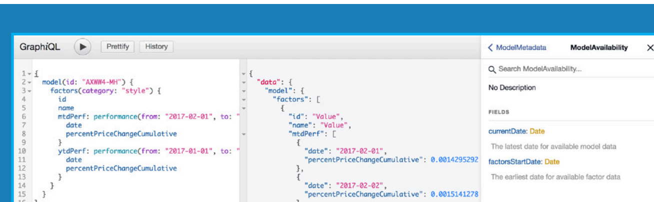
MANAGE

Determine factor trends and identify time periods when market dynamics, internal thematic shifts or portfolio turnover significantly alter your exposure.

- Facilitate ability to harvest gains and trim losses while managing quantitative risks.
- Set factor exposure targets and simulate trades.
- Ensure adherence to exposure targets prior to making significant moves in your portfolio.
- Avoid being caught on the wrong side of factor sell-offs.

DEVELOPER PLATFORM / API

Integrated with Wolfe Research factor models, you can pull unique, actionable data directly into your internal and third-party systems.



- A single view of performance across your entire organization
- Tighter collaboration between front, middle and back office
- Supports most commonly used programming languages including: Java, C++, C#, Python, Go, Ruby, Objective-C, Node.js, PHP

CONTACT US

Mackenzie Fulk
MD, Co-Head of Global Institutional Sales
(646) 845-0715
MFulk@WolfeResearch.com

WOLFE RESEARCH
www.wolferesearch.com

OMEGA POINT
www.ompnt.com

Omer Cedar
CEO
(617) 823-8472
omer.cedar@ompnt.com

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