

Nasdaq Dorsey Wright

Founded in Richmond, Virginia in 1987 and acquired by Nasdaq in 2015, Nasdaq Dorsey Wright is a leading provider in technical analysis research, portfolio/risk management, and momentum strategies. The foundation of our research is Point & Figure charting, which we believe is an effective tool for cutting through the noise in a security's price to focus on the relationship between supply and demand and identify areas of strength within the market. By focusing on momentum, which we refer to as Relative Strength, we help remove emotion and subjectivity from the investment process, focusing instead on implementing an objective, rules-based process that can adapt to changing market dynamics and help you stay the course.

Our Mission

Our mission is to empower financial advisors by providing them with tools and insights to leverage our expertise to better serve their clients. Through our research platform, partnerships with leading mutual fund and ETF providers, and managed account strategies, we are able to translate the insights we glean from our Point & Figure and Relative Strength analysis into several different forms, allowing investors to access our methodology in whatever way best fits their investment process. We provide research, tools, and investment products that help investors to manage portfolios based on unbiased, unemotional, objective data, which has helped us guide our clients through multiple bull and bear markets over our 30+ year history.

7K+
RESEARCH PLATFORM
USERS

30+
LICENSED ETFS/
MUTUAL FUNDS/UITs

100+
MODEL PORTFOLIOS

10+
MANAGED ACCOUNT
STRATEGIES

1. Nasdaq Dorsey Wright Research Platform

In addition to an extensive database of Point & Figure charts on over 50,000 securities and a daily research report with timely market insights and security recommendations prepared by the Nasdaq Dorsey Wright analyst team, our research platform gives you access to tools designed to help you in the following areas:



Asset Allocation

- Determine broad technical outlook of the market to focus portfolio allocations within areas of Relative Strength
- Use technical indicators to identify when supply or demand is in control of the market



Idea Generation

- Pair fundamental lists of "what to buy" with technical insights on "when to buy"
- Transparent and straightforward rating system for over 50,000 individual stocks, ETFs, and mutual funds that are designed to increase your odds of success over time



Portfolio Monitoring

- Upload or construct watchlists to monitor the technical strength of a roster of securities
- Use our alerts system to stay informed of changes in the technical outlook of a security, portfolio, or the market as a whole



Model Portfolios

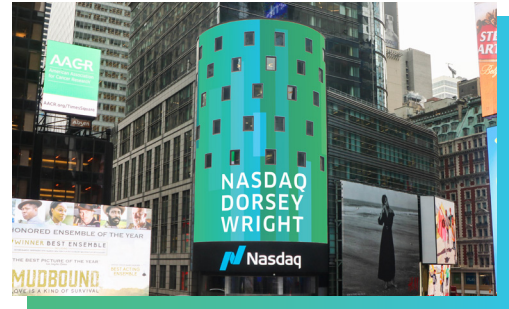
- Identify leaders based on Relative Strength and build a rules-based, repeatable process
- Access to 100+ turnkey stock, ETF, and mutual fund model portfolios
- Build, back test, and implement custom model portfolios



Sign Up for a Research Platform Free Trial:
www.dorseywright.com/trial/

2. Nasdaq Dorsey Wright Indexes

Nasdaq Dorsey Wright partners with several leading mutual fund and ETF providers, including First Trust, Invesco, and ProShares, to turn Nasdaq Dorsey Wright indexes into investible strategies. Nasdaq has established itself as one of the largest providers of investment indexes with over 30,000 indexes globally, including a lineup of momentum indexes that are constructed using the Nasdaq Dorsey Wright methodology. There are currently over 30 investment products linked to Nasdaq Dorsey Wright indexes.



3. Nasdaq Dorsey Wright Managed Account Strategies

Our Systematic Relative Strength family of investment strategies are available as separately managed accounts (SMAs) and/or unified managed accounts (UMAs), on over 15 platforms. We employ disciplined, rules-based methodologies that seek to capitalize upon long-term leadership trends, by applying our Relative Strength model across varying investment universes and model constraints resulting in different risk and return profiles.



Domestic Equities

- Systematic Relative Strength Core
- Systematic Relative Strength Aggressive
- Systematic Relative Strength Growth



Fixed Income

- Tactical Fixed Income



International Equities

- Systematic Relative Strength International



Multi-Asset

- Systematic Relative Strength Balanced
- Global Macro



View managed accounts and where they are available or visit
www.nasdaq.com/SMA-UMA

For more information on Nasdaq Dorsey Wright's research platform, managed accounts, indexes and investment solutions, visit www.nasdaq.com/nasdaq-dorsey-wright or contact sales@dorseywright.com

Dorsey, Wright & Associates, LLC, a Nasdaq Company, is a registered investment advisory firm. Registration does not imply any level of skill or training. The relative strength strategy is NOT a guarantee. There may be times where all investments and strategies are unfavorable and depreciate in value. Relative Strength is a measure of price momentum based on historical price activity. Relative Strength is not predictive and there is no assurance that forecasts based on relative strength can be relied upon to be successful or outperform any index, asset, or strategy. Neither the information nor any opinion expressed shall constitute an offer to sell or a solicitation or an offer to buy any securities, commodities or exchange traded products. For Institutional Investors Only.