



FTSE Russell Indices Added to Syntax Direct Platform



Sarah Grieco February 4, 2025

Financial advisors to benefit from the rapid ability to customize FTSE Russell indices on the Syntax Direct platform

NEW YORK, NY (February 4, 2025) – Syntax Data, a leading provider of direct indexing technology, today announced a partnership with global index provider, FTSE Russell, to integrate its indices on the Syntax Direct™ custom index creation platform. The collaboration empowers financial advisors to customize major industry benchmarks to meet the specific needs and preferences of clients across mass affluent market segment.

According to Boston Consulting Group¹, direct indexing is among the fastest growing segments of the wealth management industry, with assets under management growing from roughly \$100 billion in 2015 to more than \$615 billion today. Syntax Direct's personalized approach enables advisors to tailor portfolios to the objectives and preferences of individual clients. To date, direct indexing has been constrained by a one-size-fits-all approach.

The integration of FTSE Russell indices into the Syntax Direct platform enables advisors to leverage major recognized benchmarks as a foundation for creating custom indices that focus on key performance drivers, such as quantitative and fundamental factors, as well as emerging investment themes. The Syntax Direct platform provides advisors with the ability to tailor personalized portfolios at scale, allowing them to serve more clients at a reduced cost.

In addition, the Syntax Direct Platform enables users to reduce the constituent counts

of the broadly diversified FTSE Russell indices, which can be difficult to manage in the private wealth space. Users will also now be able to employ FTSE Russell indices as performance benchmarks on the platform.

“The addition of the preeminent US institutional benchmarks to our platform provides FTSE Russell with direct access to the rapidly expanding wealth management segment,” said **Patrick Shaddow**, CEO of Syntax Data.

“Advisors can now utilize the full suite of FTSE Russell indices to deliver institutional-quality solutions, including portfolio customization, back-testing, and reporting to clients across various wealth levels.”

“The inclusion of FTSE Russell indices on Syntax Direct opens up a new range of opportunities for wealth managers catering to the mass affluent market segment,” said **Ryan Sullivan**, Head of Buy-Side at FTSE Russell, an LSEG business.

“Investment professionals are able to maximize the market opportunity while creating more targeted and client-centric outcomes.”

For more information, visit www.SyntaxData.com/Direct.

ABOUT SYNTAX DATA

Syntax Data empowers investment managers, wealth advisors and institutions with precise, transparent data solutions that optimize index development, portfolio customization, and investment analysis to drive better investment outcomes. Built on its patented Functional Information System (FIS[®]) technology inspired by systems sciences, Syntax's solutions are powered by the most comprehensive, granular, and accurate revenue-derived data available on the market. Learn more at www.SyntaxData.com.