



Syntax and 17 Asset Management announce partnership and the launch of the Intentional Solutions Platform



Irene Chow September 12, 2023

NEW YORK, September 12, 2023 /Business Wire/ -- Syntax (www.syntaxdata.com), a leading provider of innovative financial data and technologies, and 17 Asset Management (“17AM”) are pleased to announce the launch of Intentional Solutions Platform (the “IS Platform”). The IS Platform will provide separately managed portfolios for each of the 17 UN Sustainable Development Goals (SDGs). Each of these portfolios will work to address systems change and drive specific types of impact. The Health & Wellness portfolio (SDG 3) will be the first Intentional Solutions portfolio launched by 17AM and Syntax and will be available before the end of September 2023. Additional portfolios focusing on the other SDGs are expected to launch later this year.

The IS Platform will provide wealth advisors a myriad of active equity portfolios that bring purpose, returns, accountability, and engagement to their client’s investments. Abdur Nimeri, President and Chief Investment Strategist for 17AM, commented, “Our goal is to help advisors provide leadership to a complex and interrelated set of goals that are becoming increasingly important to individual and institutional investors and to have the products to execute.”

Patrick Shaddow, President and CEO of Syntax said,

“The Intentional Solutions Platform provides

investors access to portfolios that leverage both Syntax’s differentiated systems-level data and 17 Asset Management’s active portfolio methodology. These portfolios will provide transparency and accountability previously lacking in the ESG and impact investing space.”

John Morris, CEO and Founder of 17AM, commented,

“This is the higher quality approach to equity investment that is needed today. Our methodology starts with the rigor of equity selection through traditional valuation factors, adds the accountability of ESG risk management factors, then uses a variety of lenses measuring the outcomes of a company's commitments to particular SDGs. Consumer demand coupled with new regulation requires this approach as today’s new standard”.

Both Syntax and 17 AM’s research will be available on the IS Platform. Together, Syntax and 17AM plan to launch SDG indices that will provide a benchmark for the individual portfolios and serve as a tool for other asset managers to innovate toward achieving the SDGs.

The SDG Goals Agenda 2030 was announced in September 2015 in Ethiopia and ratified by 193 countries as a mechanism to partner with private capital to achieve these goals by 2030.

Syntax was founded by Rory Riggs, a pioneer in systems economics. Rory was in Ethiopia in 2015, representing his private company to pledge his support. He had early success in his career as a leading investment banker to the pharma industry, where he witnessed how deep, science-based research led to outsized returns. He also observed that once the human genome was mapped, research shifted focus from individual molecules to biological systems and solutions began accelerating. Rory recognized that the finance industry was still using singular factor data and not looking at overall systems-level data, so he brought together data scientists, financial engineers and a strong leadership team to build what has now become Syntax.

After the adoption of the 2030 Agenda for SDGs in 2015, John Morris immediately invested in the domain “17 Asset Management” and created a plan to start a firm that would use the SDGs as an organizing framework for the growing demand for responsible investments.

About Syntax

Syntax is a financial data and technology company that has pioneered a proprietary approach to index construction, portfolio analysis, ESG and SDG measurement and other investment applications. Its patented Functional Information System (FIS®) platform goes beyond traditional sector and industry classification by using a systems approach to organize public and private companies. Clients can understand a company’s business characteristics and product lines to evaluate its risk and reward profile with pinpoint accuracy through Syntax’s FIS-based Affinity® platform. Syntax’s mission is to power economic analysis and enable investors to make better decisions. Learn more at www.syntaxdata.com.

About 17 Asset Management

17 Asset Management is an asset management and consulting firm. We build and advise asset management products designed to serve the growing needs of consumers looking to embed purpose and impact into their investments. We have developed a unique research-driven process to create products that ensure stakeholder engagement, impact accountability, and investment performance. We believe achieving these Global Goals will result in superior long-term returns, while also contributing to a world that is

economically prosperous, environmentally secure, and more inclusive. For additional information, visit www.17assetmanagement.com.