



Syntax Data to Deliver Index Universe for New SmartTrust® Power Solutions Trust



Sarah Grieco January 30, 2025

New York, NY, January 30, 2025 -- Syntax Data, a leader in innovative financial data solutions, is proud to announce the expansion of its partnership with SmartTrust®, a leading provider of Unit Investment Trusts (UITs). The SmartTrust Power Solutions Trust tracks the Syntax Power Solutions Index, which holds US-listed companies involved in solar, wind, nuclear, and natural gas power generation, as well as manufacturing related equipment.

This innovative thematic index is designed to participate in the evolving energy landscape by providing exposure to clean energy, hydrogen and fuel cells, biofuels, and smart grid technologies.

Kevin Mahn, President & CIO, SmartTrust® said, “With U.S. power demand projected to continue to grow significantly, and data center electricity use, in particular, expected to rise by 160% by the decade's end, the time for a dedicated investment solution that targets the next generation of power solutions seemed appropriate.”

This expanded partnership underscores both companies' shared commitment to providing investors with forward-thinking strategies in an evolving market. The Power Solutions Trust, built on Syntax's proprietary Functional Information System (FIS®), is designed to deliver targeted exposure to companies driving advancements in power generation, renewable energy, and innovative energy solutions.

“Syntax Data's FIS® is an industry-leading framework that classifies companies based on their business functions, enabling purer diversification and more precise sector

exposures,” said Patrick Shaddow, CEO, Syntax Data. “By utilizing this approach for the Power Solutions Trust, investors gain access to a portfolio designed to capitalize on opportunities within the growing and dynamic energy sector.”

“By applying a precise, data-driven approach, the Syntax Power Solutions Index helps investors unlock opportunities in the evolving energy landscape,” said Andrei Senyuk, SVP, Index Development at Syntax Data.

“SmartTrust is excited to work with Syntax to bring SmartTrust’s brand of unique, innovative and UIT focused offerings.” said Matthew Wolcott, COO, SmartTrust®.

About Syntax Data

Syntax LLC is a financial data and technology company that codifies business models into a relational system we call Affinity® Data. Syntax operates through three segments: Affinity® Data, Syntax DirectSM, and Syntax Indices. Using its patented FIS® technology inspired by systems sciences, the Affinity® Data segment offers the most comprehensive, granular, and accurate product line revenue data available on the market. The Syntax DirectSM segment then uses this abundance of data to facilitate the near instantaneous creation and ongoing management of boundless direct indexing solutions and rules-based equity portfolios through a fully automated platform. The Syntax Indices segment offers customized and proprietary indices, including core global benchmarks and micro- and macro-thematic, smart beta, defined outcome, and target volatility indices. These indices are foundational for a range of financial products, such as ETFs, UITs, and structured products.

About SmartTrust®

SmartTrust® UITs, sponsored by Hennion & Walsh, offer diversified income and total return opportunities through innovative investment strategies. Headquartered just outside of New York City, in Parsippany, NJ, Hennion & Walsh deposited its first SmartTrust® UIT in 2003 and currently has 25 different UIT strategies available for purchase in the primary market. For more information about Hennion & Walsh's SmartTrust®UIT products, please contact the firm's Internal Support Desk at (888) 505-2872, or visit www.smarttrustuit.com. Hennion & Walsh is a member of FINRA and SIPC. Additional information on Hennion & Walsh is available at www.hennionandwalsh.com.

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