



Syntax Data and TradePMR Collaborate to Provide Financial Advisors with Index and Portfolio Development Capabilities



Sarah Grieco March 4, 2025

Leading brokerage and custodian services provider adds Syntax Direct platform to tech stack, available to all TradePMR users

NEW YORK, NY (March 4, 2025) – Syntax Data, a leading provider of direct indexing technology, today announced a collaboration with TradePMR, a leading brokerage and custodian services provider for independent financial advisors, which will provide TradePMR users access to state-of-the-art index and portfolio development capabilities. As part of the integration, TradePMR is adding the Syntax Direct custom index creation platform to its tech stack, making it available to all TradePMR users.

The partnership puts TradePMR at the leading edge of portfolio construction innovation in the rapidly growing direct indexing market. Financial advisors using the TradePMR platform are now able to offer their clients an endless array of custom indices at a minimal price point. The functionality of Syntax Direct allows TradePMR advisors to create, manage, and market highly customized portfolios at scale, giving them all the benefits of a disciplined and structured index investment.

“RIAs using Syntax Direct within TradePMR will

be better able to tailor investment solutions that match their clients' objectives preferences more precisely – at a lower total cost than is currently available in the market,” said **Patrick Shaddow**, CEO of Syntax Data. “We help advisors and their clients save money on fees, get higher portfolio returns, and create higher margins.”

“We believe this integration brings a powerful new level of personalization and efficiency to the financial advisors we serve,” said **R. Scott Victoria**, Chief Operating Officer at TradePMR. “By lowering fees and simplifying portfolio management, Syntax Direct helps lower the barrier of entry for advisors to offer highly customized investment solutions to their clients. This frees them up to focus on what they do best – deepening client relationships and growing their business.”

This partnership – announced live at the 2025 T3 Technology Conference in Dallas, the leading wealthtech conference in the industry – comes on the heels of Syntax’s recent partnership with global index provider FTSE Russell to integrate its indices into the Syntax Direct platform. The Syntax Data-TradePMR partnership is similar to one announced in late 2024 in which Syntax entered into an arrangement with comprehensive technology platform Advyzon – another integration partner of TradePMR.

For more information on Syntax Direct, please [click here](#). For more information on TradePMR’s tech stack integrations, please [click here](#).

ABOUT SYNTAX DATA

Syntax Data is a financial data and technology company that empowers investment managers, wealth advisors, and financial institutions with precise, transparent data solutions that optimize index development, portfolio customization, and investment analysis to drive better investment outcomes. Syntax operates through three segments: Affinity® Data, Syntax Direct, and Syntax Indices. 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.

ABOUT TRADEPMR

For more than two decades, TradePMR has worked with growth-minded independent registered investment advisors (RIAs), providing innovative technology tools and support designed to transform their businesses. The award-winning brokerage and custodian services provider (Member FINRA/SIPC), based in Gainesville, Florida, works to streamline fee-only investment advisors' operations through comprehensive custodial, operational, and trading support. For more information, visit www.TradePMR.com.