



Syntax Introduces Breakthrough Custom Direct Indexing Platform



Sarah Grieco January 23, 2024

Provides Personalization at Scale for RIAs and FAs

NEW YORK, January 23, 2024 -- Syntax LLC, a New York based data provider, introduced today its new wealthtech platform, Syntax Direct™, at the T3 Technology Conference 2024 in Las Vegas, Nevada. Syntax Direct puts advanced index creation and management capabilities in the hands of financial advisors and wealth managers.

Syntax Direct offers financial advisors a seamless front-to-back solution that covers every step of the index development process, from custom indexed portfolio creation to the immediate production of daily index files that support efficient asset management. Key features of Syntax Direct support performance analysis, compliance requirements, marketing and record keeping.

Said Syntax CEO, Patrick Shaddow,

“Syntax Direct brings the creation of intellectual property to the doorsteps of the American household. The platform empowers financial advisors to create personalized investment solutions at scale, thereby shifting the product creation process from traditional asset managers to financial consumers.”

Syntax' patented Affinity Data™ drives key functions of the platform, providing accurate, fully documented and compliance-friendly outcomes. Said Syntax COO, Jonathan Chandler,

“All of our data is reliably sourced, cited and archived to provide optimal transparency and eliminate ‘black box’ opacity.”

Technology and innovation have leveled the playing field to make financial markets more accessible. What was once the purview of the ultra and high-net-worth individuals has become increasingly available to the broader investment community through advancements in technology and innovations in custodial accounting. Custom direct indexing is the next major secular change.

Syntax Direct gives advisors the ability to provide custom personalized solutions at scale, thereby increasing operational efficiency. It enables advisors to serve more clients at lower cost. Said President of Technology Tools for Today (T3), Joel Bruckenstein,

“When investment advisors face growing customer demands for customization and differentiation, Syntax Direct provides a timely and effective solution.”

About Syntax

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 Direct™, 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 Direct™ 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.