FLX NETWORKS

QUARTERLY PERSPECTIVE

October 2025

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Redefining Relationships: Powering the Next Era of Asset and Wealth Management

In every corner of asset and wealth management, firms are rethinking how they connect. Relationships remain at the heart of our business, but the way those relationships form, grow, and scale is evolving.

At FLX Networks, we're proud to be leading that change.

Our vision has always been simple: to modernize, simplify and revolutionize how asset and wealth managers collaborate. What started as an idea to reduce friction in distribution has become something much larger, a multi-sided digital marketplace that unites an entire industry.

This isn't about technology replacing human connection. It's about using innovation to amplify it, helping firms connect smarter, faster, and with greater impact.

What We're Building Together

Think about what Bloomberg did for market data, what AWS did for digital infrastructure, and what the App Store did for software. Each transformed a fragmented, inefficient process into a connected, intelligent system – one that empowered participants, accelerated collaboration, and raised the standard for everyone.

That's what we're building at FLX.

- *Like Bloomberg* - FLX provides a single, centralized hub, not for prices or charts, but for the relationships, perspectives, and insights that drive the business of asset and wealth management.
- *Like AWS* - we deliver the infrastructure that helps firms scale relationship management efficiently and securely.
- *Like LinkedIn and Salesforce* - we combine network effects with workflow technology, enabling discovery, engagement, and execution – all in one governed ecosystem.
- *And like the App Store* - every new member, asset manager, and wealth manager enhances the value for everyone else, creating a more robust community and powerful network flywheel.

Why Now Matters

As an industry, we're at an inflection point.

Firms that recognize the shift and act now will lead the next generation of our industry. Those that wait risk being left behind as new models redefine how partnerships form and value is created.

This isn't about being early, it's about being ready – because connections create opportunities.

For Asset Managers:
You can access participating wealth platforms' relationship management, product and manager research teams seamlessly through one destination, allowing you to share key updates and timely information that keep your firm and products top of mind. It also means that you can hear directly from wealth managers and be among the first to know when searches and promotional opportunities arise.

For Wealth Managers:
The network provides a single location to manage hundreds of asset manager relationships, enabling you to communicate with all of them in a simple and streamlined way while also ensuring you are able to customize your communications on a one-to-one basis.

And these are just a few examples. Every time a new firm joins FLX, the network grows stronger. Data becomes smarter. Insights become clearer. Opportunities multiply. The collective momentum of this community is already transforming how firms operate, and we're only getting started.

The Road Ahead

Our goal isn't simply to provide a platform; it's to deliver an operating system for collaboration across asset and wealth management.

The same way Bloomberg became indispensable to financial professionals, FLX aims to become indispensable to how our industry builds and sustains relationships.

As we continue to expand our capabilities and enterprise relationships, one thing remains constant: our belief that innovation and collaboration are not competing forces - they're complementary ones. Together, they create a foundation for long-term growth and transformation.

An Invitation

If you're already part of the FLX community, thank you! Your engagement and ideas fuel this evolution.

If you're not yet part of it, I invite you to take a closer look. Don't wait for the change to happen around you, help lead it.

Because the firms shaping the future of our industry aren't just adapting to transformation, they're driving it.

And they're doing it, together, on FLX Networks.

Thank you for your continued partnership, and let's continue to transform our industry, together.

Brian Morau

Introducing FLX Reels

Bring Your Insights to Life in Minutes.

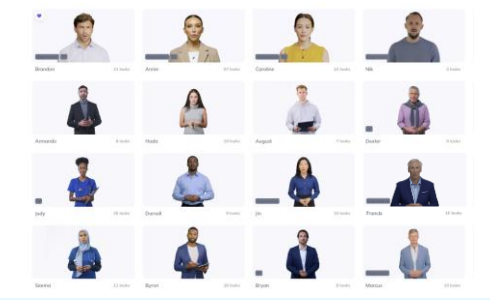
Many professionals don't have the time or desire to appear on camera and even fewer have the bandwidth to perfect their delivery. FLX Reels eliminates that hurdle by creating polished, on-brand videos without you ever stepping in front of a camera.

How it works

Using advanced AI avatar technology, FLX Reels pairs your message with a digital presenter to create compelling videos that keep your clients informed and your brand ahead of the competition.

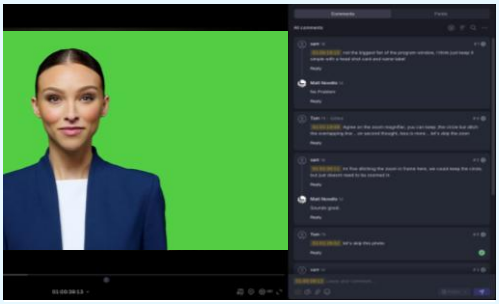
Create Your Script

Send us your compliance-approved script or collaborate with the FLX Media team to develop one.



Match with Your Digital Persona

We'll pair your content with the right digital persona to deliver your message with maximum impact.



Streamline Review & Approval

Provide frame-accurate feedback through our secure, cloud-based video review platform. Making approvals fast, simple, and efficient.

Professional presentation without the high production costs.

Skip the stress of being on camera, let your digital persona do the work for you.

Build an entire library of on-brand videos without ever stepping into a studio.

FLX Reels Transforms Your:

- Market Insights
- Commentary
- Product Updates
- Market Outlooks
- Fund Info/Spotlights
- Client Education
- Investment Insights
- Quarterly Updates

Into engaging, professional video content that builds trust, drives engagement, positions your firm as a thought leader, and grows your business.

Introducing FLX Reels

FLX NETWORKS

The Power of Videos

91%
of consumers prefer video content

84%
say watching videos convinced them to purchase

95%
retain information better when they watch a video vs. read text

19%
increase in email open rates when video content is included

1200%
more shares generated by video vs. text and image content combined

The Impact

Professional, On-Brand Video Content

Bring your content to life with instantly generated, high-quality videos featuring professional narration, dynamic visuals, and seamless branding that enhance your firm's credibility and capture attention across crowded digital channels.

Optimized for Every Platform

Deploy videos across client portals, social media, and email campaigns. Tailored for each platform and proven to generate 3x more engagement than static posts to keep your insights front and center.

Targeted & Timely Messaging

Deliver customized, on-brand content for every client segment while responding quickly to market events, earnings releases, and client questions to keep your insights top-of-mind.

Scalable Content Creation

Expand your output with unlimited video creation that grows alongside your business needs, without sacrificing quality or consistency.

Ready to Amplify Your Market Voice?

Schedule a live demo or contact your FLX representative to add Reels to your membership.

New from FLX Media

On-demand content and the ability to showcase your brand are essential to maintaining an omnichannel presence. FLX Media can help you deliver differentiated content to increase your visibility and convey key information about your firm and products.

Contact Matt Novello, Head of FLX Media, to learn more.

The Latest from FLX and Our Community

Sound Point Capital
U.S. Direct Lending

OHA- We are going to need a Bigger Borrower

FLX Networks
The Future of Engagement

FLX Engage 360

Friday Film Series: Catch up on thought leadership and key firm updates in this weekly series from CEO Brian Moran.

FLX Tuition Rewards

The Investment

Creative Hustle

Resilience

Asset Manager Insights: Stay up to date on the various strategies and products our members offer.

Leuthold Group
Core Investment Strategy
3Q'25 Market Update

Intech ETFs
3Q'25 Quarterly
Market Update

Third Avenue Management
Strategy Spotlight:
Global Value

River North FLDZ
Folds of Honor