



NEWS FROM THE MOTIVE PARTNERS NETWORK

Wilshire Acquires ParkLexington to Enhance Operations, Profitability, and Performance for Investment Managers

ParkLexington's optimization strategies for asset managers complements and expands Wilshire's existing proprietary data, analytics, and cost analysis platform

ParkLexington clients have realized billions of dollars in cost savings since the firm's founding

Acquisition positions Wilshire as the market leader in investment cost data, transparency, and analytics

New York, NY, July 15, 2025 – Wilshire Advisors LLC (“Wilshire”), a leading global financial services firm, today announced that it has acquired ParkLexington Advisors, LLC (“ParkLexington”), a data and analytics firm focused on improving fund and investment firm operations, profitability, and performance. Through this transaction, Wilshire will meaningfully expand its data, cost transparency, and analytics capabilities for all clients. The financial terms of the transaction were not disclosed. ParkLexington is a leading data and analytics firm specializing in improving profitability and performance for investment managers and funds. By leveraging proprietary industry intelligence and benchmarking, ParkLexington identifies cost-saving opportunities, optimizes operations, and enhances fund performance, resulting in billions of dollars of savings for its clients since the firm's founding. Its comprehensive services cover all aspects of investment management, including custody and administration, foreign exchange, cash, trading, compliance and many more cost saving and performance enhancing areas. The transaction builds upon the data, technology, and fee optimization services for asset owners that were established by Wilshire's acquisition of XTP Implementation Services in 2024. With the addition of ParkLexington, Wilshire will be able to provide enhanced analytical capabilities for investment managers to analyze and harness proprietary data to deliver solutions that reduce costs, improve performance, and maximize profits.



Jason Schwarz, CEO at Wilshire, said: “ParkLexington’s ability to help investment managers unlock opportunities to drive operational alpha is unique in the industry. The proprietary data and dynamic analytics the company has developed and tailored for asset managers is an ideal complement to Wilshire’s existing cost analytics capabilities for asset owners. The ParkLexington capability solidifies Wilshire’s position as a market leader in helping investors improve outcomes across the entire value chain of performance, manage risk, and cost.”

John Detweiler, Founder and Managing Partner at ParkLexington, said: “For over a decade, we have helped some of the largest asset managers in the world uncover hidden sources of performance and profitability by analyzing and benchmarking transaction costs, expenses, and inefficiencies across the investment management value chain. Our structured approach delivers transparency, reduces costs, improves performance, and maximizes profits, providing clients with a competitive advantage. We could not have found a better partner than Wilshire to accelerate the impact of our platform for our clients.”

Andy Stewart, Executive Chairman at Wilshire, said: “The addition of ParkLexington’s proprietary data, sophisticated analytics, and talented team to Wilshire will further enhance our ability to analyze and meaningfully reduce the cost of our clients’ investment programs. With XTP and now ParkLexington, Wilshire is well-positioned as the market leader in investment cost data, transparency, and analytics. We could not be more excited to welcome ParkLexington to Wilshire.”

Houlihan Lokey acted as exclusive financial advisor to ParkLexington.

About Wilshire

Wilshire is a leading global financial services firm and trusted partner to a diverse range of approximately 300 leading institutional investors and financial intermediaries.¹ Our clients rely on us to improve investment outcomes for a better future. Wilshire advises on over \$1.4 trillion in assets and manages \$120 billion in assets as of March 31, 2025.² Wilshire is headquartered in the United States with offices worldwide. More information on Wilshire can be found at www.wilshire.com.

¹ Includes institutional investors, financial intermediaries, and Wilshire-sponsored vehicles. Does not include individual retirement plans and retail investors via financial intermediary platforms.

² Assets under advisement refers to the total amount of assets (inclusive of assets under management) attributable to all of Wilshire’s advisory relationships, including various consulting and advisory relationships for which Wilshire provides investment advisory services without engaging, on either a discretionary or non- discretionary basis, in the direct management of a client’s portfolio. Assets under management refers to the amount of assets attributable to securities portfolios for which Wilshire provides discretionary and non- discretionary asset management services and is calculated differently than “regulatory assets under management.”

**About ParkLexington**

ParkLexington is a global data, analytics, and consulting firm that improves investment manager performance and profitability. Since 2011, ParkLexington has identified and implemented over \$1 billion in improved costs, spreads, rates, and revenue for over 60 leading asset managers. More information on ParkLexington can be found at www.parklexington.com

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