KINGSWOOD

Kingswood Raises $83,177.52 in 2024 for A Friend's House

Ashley Webb (center) with A Friend's House leadership, commemorating Kingswood's 2024 donation.

Thank you to our advisors, partners and team members for helping us make a difference to Atlanta-area youth.

Thank you to everyone who joined us in supporting A Friend's House in 2024. A Friend's House is making a difference in the Atlanta community:

- 16 program participants graduated high school in 2024
- 6 current residents are in college or participate in dual enrollment, taking college credit classes while in high school
- The organization boasts a 97% passing class rate (a 25% increase in the last two years)
- A Friend's House provided 8,127 nights of care across residents in 2024

Our collective donations are put to good use:

- In a year of increasing costs, our funds helped bolster the food budget tremendously - they spent over $70k on just food in 2024
- Some of the funds are helping purchase a desperately needed new van to transport students as the old one is no longer repairable

- Some funds are being put into the reserve to go towards the Tiny House project, which is getting close to finally having some land to begin building on

There is more work to do! We are continuing to accept donations to A Friend's House in 2025. Kingswood continues to match donations dollar-for-dollar. To learn more or to donate, please contact Ashley Webb (awebb@kingswoodus.com).

Team Members: Kingswood Welcomes James Grebenc

Please join us in welcoming James Grebenc to our investment banking team as Managing Director, Institutional Sales/Corporate Access. He has over 25 years of experience in institutional sales and capital markets, servicing companies ranging from emerging growth to the mega-caps, specializing in life sciences, healthcare, technology, media, metals & mining.

James is based out of our office in Brickell, Florida & can be reached at jgrebenc@kingswoodus.com.

Insights: The Life Cycle of an Alternative Investment

Managing director of investment solutions, Douglas Blake, was recently interviewed by Greg Mausz, ADISA director and senior managing director at Skyway Capital Markets. In the interview, they explored the comprehensive journey of an alternative investment, covering everything from the sponsor's role and due diligence to ongoing monitoring and eventual exit strategies. They stress the importance of understanding each phase of the investment process, highlighting how a holistic approach is essential for making informed decisions and managing risks effectively.

Kingswood Partners: Black Diamond Wealth Platform

From client relationships to compliance, reporting to rebalancing, the world of wealth management is complex and demanding. The Black Diamond Wealth Platform frees you to devote the time you need to guide your clients through their complete wealth journey. Intuitive dashboards, robust functionality, smart integrations and exceptional service make it easy to deliver a sophisticated, modern client experience.

Kingswood is pleased to make the Black Diamond Wealth Platform available to our advisors. To learn more, please contact Nicole English (nenglish@kingswoodus.com), or access the information available in the Advisor Resources Center (log-in required).

CIO Corner

Kingswood CIO Scott Poore, AIF®, AWMA®, APMA® writes two blogs a week - a Monday Market Recap and Friday Market Musings.

- 4/21/2025 – Markets Mixed as Tariff War Continues
- 4/18/2025 – Should Investors Carry On?

Equity Research

Kingswood recently initiated coverage on SuperCom, Ltd (Nasdaq: SPCB) - a global secure solutions integrator and technology provider for governments and other consumer-facing organizations - with a BUY rating. We also initiated coverage on NeurAxis, Inc. (Nasdaq: NRXS) - a growth stage medical technology company developing neuromodulation therapies to address chronic and debilitating conditions in children and adults - with a BUY rating. There are also updates to our coverage on MIRA Pharmaceuticals (Nasdaq: MIRA) and Vertex Pharmaceuticals (Nasdaq: VRTX).

If you are interested in learning about how the Kingswood Equity Research Team can cover your company, please email research@kingswoodus.com.

Investment Banking

Kingswood was pleased to serve as Sole Bookrunner on the Intercont (Cayman) Limited (Nasdaq: NCT) IPO. Congratulations to our investment banking team on a job well done.

INTERCONT

$10,500,000

Sole Bookrunner

MARCH 2025

Initial Public Offering

Please visit the Investment Banking Transactions page on KingswoodUS.com for a complete list of deals we've been a part of.