NEWS FROM THE MOTIVE PARTNERS NETWORK

InvestCloud Achieves Significant Performance Milestones Resulting from Strong Client and Market Momentum

Award-winning innovation and consistent execution drive client excellence, strong results, and expected record sales.

More than $9 trillion in assets across global wealthtech platforms including more than $4.2 trillion in APL managed accounts.

Altic™ and PM+™ deliver next-generation private markets innovation across the managed accounts landscape.

New York, NY, September 22, 2026 – InvestCloud, a global leader in wealth technology, today shared milestone achievements and continued momentum since launching its new strategic direction on October 1, 2024. In just under two years, the company has advanced a program of focused investment, commitment to client excellence, and delivering innovative wealth solutions that are smarter, connected, and scalable.

InvestCloud's progress reflects the execution of a strategy built around product innovation and differentiation, deeper client relationships, and operational excellence which is translating to strong performance. The company returned to positive revenue growth earlier than expected in 2025 and expects to achieve double-digit revenue growth in the current fiscal year.

> "Since introducing our new strategic framework, we have been deliberate about turning our ambition into strong and consistent execution which enables our clients to win," said **Jeff Yabuki, Chairman and CEO at InvestCloud**. "We are investing in innovation that addresses market need and have assembled an outstanding team committed to excellence in everything we do."

Proof Points Across the Wealth Ecosystem

InvestCloud delivers managed account solutions, private markets network infrastructure, and advisor and client digital engagement solutions – powered by SMART^{AI}, the company's approach to enabling AI and data-centric capabilities across its platforms.

Strong market demand coupled with focused execution has driven outstanding sales performance for the first half of the year. Given this market momentum, the company expects to achieve record sales for the year.

To build on the progress, InvestCloud recently brought together company leaders to showcase its technology for industry analysts and consultants. The discussions centered on the industry's most pressing challenges: rising expectations for personalization, increasingly complex portfolios, fragmented technology, advisor productivity, and the responsible application of AI.

> "If you look at the recent trajectory of InvestCloud, $9T of client assets with more than $4.2T in managed accounts is a huge vote of confidence by the industry and a good sign that they're successfully supporting some of the most successful advisory firms, with some of the most complex technical and client experience capabilities being innovated today.
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> The most compelling part of the InvestCloud story to date is its success in innovating and integrating the most scalable and battle-tested tools used by highly complex firms, while introducing a new approach to alternative assets at-scale. Integrating managed accounts, private markets and modern digital client experiences at this type of scale is what the largest and most complex firms desperately need."
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> – **Doug Fritz, Co-Founder & Executive Chairman, F2 Strategy**

Momentum in Managed Accounts: APL Leadership

InvestCloud's APL managed account platform has extended its leadership position to include more than $4.2 trillion in assets, up 20% from $3.5 trillion a year ago, 11 million accounts, 4.7 million active models, and an average of 2.4 million trades per day. APL connects many of the world's largest wealth and asset managers, powering real-time portfolio management and trading across the full spectrum of managed accounts. It provides a single, highly scalable technology platform for model governance, trading, accounting, and reporting.

- APL has introduced more than 200 new innovations and features so far this year with more slated to be delivered. These advancements span continued platform modernization, data and AI capabilities, enhanced operational tools, and the expansion of PM+™, which enables private market assets to be held alongside public market assets within a single model and portfolio. Together, these new capabilities represent one of the most significant periods of innovation in APL's history, building on its industry leadership and scale to define what's next across the continuum of managed accounts.
- A new data platform provides governed, integration-ready access to portfolio, accounting, and operational data, which makes using data easier for clients and

accelerates innovation across the ecosystem. In addition, APL is advancing an Intelligent Ops capability, applying AI and natural-language capabilities to help users interact with APL data, identify operational insights and anomalies, and automate more complex workflows.

- InvestCloud's PM+ is a groundbreaking new solution that expands APL's capabilities to enable private market assets in managed accounts. Approximately $8 billion of private market assets are on the APL platform today – demonstrating strong early interest in alternatives as a key element of a model-based portfolio.
- PM+ is the only solution in the market that allows fully automated, model-based investing of public and private assets in a single managed-account structure. This unique capability allows private assets to be modeled, managed, rebalanced, and reported alongside public assets in a fully automated fashion.
- Several large wealth management clients have signed up for PM+ in the short time it has been available, with a number of clients in the pipeline.
- Integration between PM+ and the company's groundbreaking private markets network, Altic™, extends the experience through private-market execution and lifecycle management, creating a more connected, rules-based, and automated workflow from portfolio construction through execution and ongoing servicing at scale.

> "InvestCloud's PM+ solution is an innovative way to integrate private market investments into managed accounts alongside public market assets within a single portfolio. The ability to model, manage, rebalance, and report on both asset types through one process can help advisors deliver more comprehensive solutions to their clients. InvestCloud has been a trusted technology provider to the AssetMark platform, and we are excited they are continuing to innovate by supporting access to private markets."
> – **David McNatt, EVP, Chief Wealth Solutions & Strategy Officer, AssetMark**

Notable Recognition:

- ThinkAdvisor Luminaries Awards 2026 | Finalist, Investment Management, Product or Service Innovation – PM+ and Altic
- WealthManagement Industry Award "Wealthies" 2026 | Finalist, Alternative Investment Platforms
- Datos Insights 2025 Wealth Management Impact Award | Winner, Best Innovation in Alternative Investments & Private Markets
- ThinkAdvisor Luminaries Awards 2025 | Finalist, Firm Award for Product Innovation – APL
- WealthManagement Industry Award "Wealthies" 2025 | Finalist, Tech Providers for Rebalancing: Personalized Rebalancing & Tax Optimization, and for Alternative Investment Platforms – PM+
- WealthManagement Industry Award "Wealthies" 2025 | Finalist, Disruptors: Technology – PM+

Momentum in Private Markets Innovation: Altic™ Network

InvestCloud has introduced Altic, the AI-native, rules-based, digital private markets network intended to provide the operational capabilities that are needed to include private market investments in managed accounts at scale across a more than $16 trillion industry. Altic supports the routing, validation, transport, and lifecycle management of private-market orders at managed-accounts scale.

- InvestCloud has committed more than $50 million to support its from-the-ground-up build to enable scaled network performance and operational excellence. The Altic infrastructure has been built with industry input including common standards, governance, and digital messaging.
- InvestCloud has commitments from several wealth and asset managers to utilize the network and expects core network services to be fully operational by year end. Altic is also launching the first of its suite of value-added services to enhance the private-public market experience in managed accounts.
- The company is holding an invitation-only gathering of notable industry participants from across the wealth ecosystem in late September to prepare for launch.

> "Leveraging InvestCloud's world-class platform, and client base of leading wealth management firms, Apollo and other general partners within the Altic network can gain unparalleled access to distribution channels, creating new possibilities for the entire ecosystem."
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> – **Stephanie Drescher, Partner and Chief Client & Product Development Officer, Apollo Global Management**

Notable Recognition:

- ThinkAdvisor Luminaries Awards 2026 | Finalist, Investment Management, Product or Service Innovation – PM+ and Altic
- Finovate Award 2026 | Finalist, Best Alternative Investments Solution
- WealthManagement Industry Award "Wealthies" 2026 | Finalist, Alternative Investment Platforms
- Money Management Institute (MMI) / Barron's Industry Award 2025 | Winner, Investment Innovation – Altic

Momentum in Advisor and Client Engagement

InvestCloud's Digital Products help wealth management firms deliver smarter, connected, and personalized experiences for advisors and clients. Since 2024, major updates to its Advisor and Client Engagement solutions include a significantly enhanced technology platform and an expanded network of partnerships and integrations. Together, this represents one of the most substantial platform evolutions in the company's history built on a modern, AI-based foundation.

- The new technology platform is designed to make Advisor and Client Engagement solutions easier, faster, and less costly to extend and integrate. A new integration approach leveraging AI agents streamlines the way fragmented systems connect into the platform.

- A modern user experience gives clients more flexibility and configuration options for bringing personalized engagement to market faster. These platform investments are already powering a new generation of products, including a new client mobile app and an AI-powered advisor workspace built on InvestCloud's modernized interface technology and user experience.
- Advisor Workspace and Client Experience are built on InvestCloud's single, governed wealth data model. As both solutions draw from this single model, advisors and clients can share the same, real-time 360-degree view of the entire household relationship and transactions – not just isolated individual accounts. Combining this with SMART^AI can enable more insight, knowledge, and trust between advisors and their clients.
- SMART^AI brings together data, intelligence, and workflow through specialized agents organized around how advisors actually work, helping them spend more time advising clients and less time navigating disconnected applications. The company has introduced its first SMART^AI agents for advisors to assist with automating work across the client relationship, including daily briefings, market news, client sentiment, client intake, chat-with-data, meeting prep and follow up, and risk monitoring, with more new agents to be introduced in the future.
- In May 2026, InvestCloud announced a groundbreaking 10-year partnership with FIS, a global leader in financial technology. Through its partnership, InvestCloud will deliver Advisor and Client Engagement solutions for FIS wealth clients in a single, connected environment. The new solution will deeply integrate with FIS core wealth platforms, allowing institutions to modernize the front office without replacing existing infrastructure.

> "Just four months after announcing our partnership, wealth management firms now have a connected front-office experience that would have taken years to build on their own. By combining FIS's core wealth infrastructure with InvestCloud's advisor and client engagement capabilities, advisors gain a real-time, 360-degree view of every client relationship through the systems they already use. Together, we're enabling firms to innovate faster by uniting modern engagement capabilities with trusted core infrastructure, without disruption."
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> – **Jim Johnson, Co-President, Banking Solutions, FIS**

Notable Recognition:

- The Digital Banker Digital CX Awards 2026 | Winner, Best Digital CX Partner
- Global Private Banker WealthTech Awards 2026 | Winner, Best AI Risk Profiling & Suitability Solution
- WealthBriefing Swiss 2026 Award | Winner, Onboarding Solution
- WealthBriefing Asia 2025 Award | Winner, Risk Monitoring & Management
- WealthBriefing European 2025 Award | Winner, CLM Solution
- WealthBriefing Swiss 2025 Award | Winner, Onboarding Solution

Momentum in Financial Performance

- InvestCloud returned to positive revenue growth in 2025 ahead of schedule. The company is forecasting low double-digit revenue growth this year and should extend its growth rate in future years.
- The company also expects to deliver strong growth in adjusted EBITDA resulting in Rule of 40+ performance for 2026. InvestCloud anticipates even stronger performance in the future even as it makes significant incremental investments in innovation, well ahead of historic levels.
- Strong market demand coupled with focused execution has driven outstanding sales performance for the first half of the year. Given this market momentum, the company expects to achieve record sales for the year.
- Key business metrics such as GRR and NRR are strong and building.

> "InvestCloud today is materially different than the company it was just two years ago," said **Heather Bellini, Chief Financial Officer at InvestCloud**. "Our team is deeply focused on serving clients, product innovation and driving operational excellence. Together, this is leading to strong financial results – and incredible optimism for the future."

Company-Wide Recognition

InvestCloud was recognized as one of CNBC's World's Top Fintech Companies in 2024 and 2026. This reflects investments in areas where client and market needs are converging: smart and connected advisor and client experiences, modern managed-account infrastructure, private markets access and infrastructure, and data-driven intelligence.

In 2026, InvestCloud earned recognition for its workplace experience, notably being named one of Newsweek's America's Greatest Places to Work for Trust, which evaluates the ways employers build credibility through transparency, ethical leadership, consistent follow-through, equitable treatment, and open communication about AI and workplace change.

InvestCloud was also recognized as one of Newsweek's America's Greatest Places to Work for Perks & Benefits. Based on 37 million data points and 179,000 employee surveys, the recognition encompasses remote work, retirement, and culture – offering job seekers a clear guide to organizations committed to sustainable, modern careers while emphasizing resilience, inclusion, and trust.

> "We know that recognition is earned by the dedication of our global team. We're committed to creating an environment where our people are engaged, feel part of a community, and are focused on serving clients with excellence," said **Yabuki**.

About InvestCloud

With $9 trillion in assets on its platforms, InvestCloud is enabling a smarter future for wealth management through innovative solutions for client and advisor engagement, managed accounts, and private markets. Its solutions enable AI-powered digital experiences for advisors and their clients that are connected and inspired. Through its unparalleled managed accounts platform and expertise, InvestCloud connects many of the world's largest wealth and asset managers with more than $4.2 trillion in assets, and over 11 million managed accounts and 4.7 million active models. The industry's first AI-native, rules-based private markets network, Altic™ from InvestCloud, enables private market transactions across managed accounts at scale. Recent InvestCloud innovations include SMART^{AI} to enable AI-powered capabilities across its platforms, and PM+™, to enable public and private market assets as part of the same managed accounts portfolio. In 2026, InvestCloud was recognized as a CNBC World's Top Fintech for the second time in three years, one of America's Greatest Places to Work by Newsweek for Trust, and a second recognition from Newsweek for Perks & Benefits. Its innovations have recently been recognized by Datos Insights, MMI/Barron's, and WealthBriefing. The company is based in New York and serves clients worldwide.

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