

Institutional Investment Management

A QUANTITATIVE APPROACH TO MODERN PORTFOLIO CONSTRUCTION

OBJECTIVE

Quantum improves the way institutions invest by making portfolios more adaptive and efficient.

INDEXING	ALTERNATIVES	ALLOCATION
<p>Indexing established asset classes improves flexibility and efficiency, with the capability of reducing expenses.</p> <ul style="list-style-type: none"> Efficient return capture is essential to portfolio alpha Tactical flexibility within asset classes improves response functions. Prioritizing assets classes most responsible for returns. 	<p>We leverage synergistic relationships to deliver insight, expertise and comprehensive capabilities.</p> <ul style="list-style-type: none"> Alternatives can be powerful portfolio enhancements. Deal sourcing and due diligence through a well-established network. Thematic investments that emphasize innovation Non-correlated assets provide real diversification. 	<p>Delivering consistent risk-adjusted performance through our distinct, well-defined, and repeatable investment process.</p> <ul style="list-style-type: none"> Progressing beyond mean variance optimization An innovative process to improve efficiency Rules based and market responsive allocations. Efforts to limit drawdowns are always a part of our investment process.

- Our team has provided investment management to institutions for decades.
- Scientific approach to dynamic asset allocations.
- Strategically prioritizing performing asset classes.
- High levels of customization

FIRM DETAILS

Annual Fee	0.65% - 1.00%
Implementation	SMA
Liquidity	Daily
Cumulative Experience	46 Yrs
Firm Location	New York, NY



CHURCHES,
CONFERENCES
AND DIOCESE



FOUNDATIONS AND
ENDOWMENTS



CORPORATIONS FAMILY OFFICES



MONEY MANAGERS



NON-
PROFITS

A HISTORY OF SERVING INSTITUTIONS UNIQUE NEEDS

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Any investor who attempts to mimic the performance of an index will incur fees and expenses which will reduce returns. Additional Important Disclosures may be found in the Custom Index Systems LLC Form ADV Part 2A, which can be found at: <https://adviserinfo.sec.gov/firm/summary/327771>.