

# SAGE ADVISORY SERVICES, LTD.

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Austin, Texas 78735  
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1996

Year  
Founded

\$30.2B

AUM/AUA as of  
12/31/2025

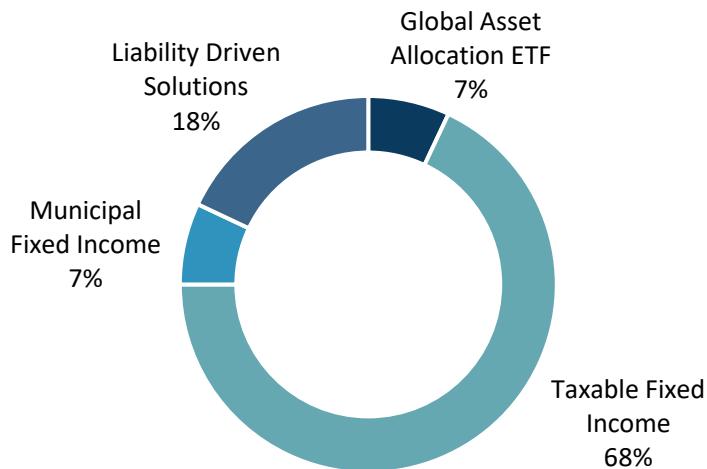
58

Employees

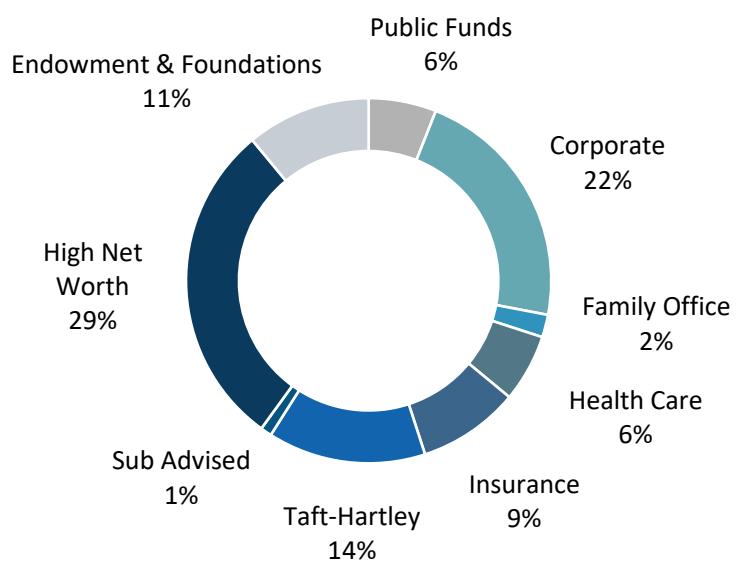
17

Investment  
Professionals

## AUM/AUA Distribution



## Client Distribution



## Why Sage

### Agility

Our size and independence as an employee-controlled firm enable us to take a nimble approach.

### Alignment

We customize the investment experience to align with each client's unique objectives and needs.

### Consistency

We have a tenured investment team and proven process that enable us to deliver expected results.

### Culture

We are committed to cultivating a culture of service and trust among our clients, our employees, and our community.

# Sage Strategies & Services



## Platform Availability

19 Firms

Fixed Income  
UMA/SMA

26 Firms

ETF Model  
Platforms

6 Firms

Cash Balance  
Platforms

9 Firms

Dual Contract  
Platforms

## Investment Process

### Macro View

- Secular, Cyclical, Near-Term
- Growth, Inflation, Policy
- Valuations, Risk Parameters

### Portfolio Design

- Translate Macro View
- Model/Optimize Risk Exposures
- Determine Portfolio Allocations

### Risk Modeling

- Holdings-Based Exposures
- Statistical-Based Analysis
- Factor-Based Stress Testing

### Security Selection

- Large-Scale Data Analysis
- Credit Analysis
- Securitized Product Analysis