

WHY DIRECT INDEXING?

Direct Indexing



STEPHANIE HILL,
Head of Index, Mellon

The potential benefits of personalized indexing through Pershing X's platform and Mellon's expertise.

Direct indexing is an investment strategy that offers a level of personalization and tax efficiency that may not be possible with traditional investment vehicles. Advisors are exploring the potential benefits and the opportunity to provide clients a unique and customized indexing strategy. They are asking: Is it right for my clients? The present has reasons why we believe an advisor might choose direct indexing for an investment portfolio.

REASON 1

CUSTOMIZE BASED ON VALUES

Create a personalized portfolio that aligns with investor goals, preferences, and values. Direct indexing allows for customizable exposures, considering specific needs an investor may have with respect to personal beliefs and individual constraints.¹

REASON 2

IMPROVE TAX ALPHAS

Manage tax implications in a cost-effective manner through tax-loss harvesting, tax-gains harvesting and tax trancheing.² Tax alphas then

Professional Perspectives On Indexing

D Keegan



Professional Perspectives On Indexing:

Unveiling the Magic of Words: A Review of "**Profebional Perspectives On Indexing**"

In a global defined by information and interconnectivity, the enchanting power of words has acquired unparalleled significance. Their ability to kindle emotions, provoke contemplation, and ignite transformative change is actually awe-inspiring. Enter the realm of "**Profebional Perspectives On Indexing**," a mesmerizing literary masterpiece penned by way of a distinguished author, guiding readers on a profound journey to unravel the secrets and potential hidden within every word. In this critique, we shall delve in to the book is central themes, examine its distinctive writing style, and assess its profound impact on the souls of its readers.

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