

Monthly Investment & Market Briefing

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 xypn invest

Presenter



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Agenda

XYPN Updates

XYPN Investment Office Update

XYPN Model Management

Dimensional Overview & Models



XYPN Updates

XYPN LIVE - Content videos now posted in Academy

XYPN Retreat - The Team is getting together at HQ, 10/13 - 10/17

Quarterly Market Update w/ EastBay is 10/21, 12pm EST

XYPN Investment Office

The Investment Team is growing!
Joe Dunn, CFA - Research and Trading

TAMP - Outsourced Trading and Operations
ETF Model Management

Sapphire - Corporate RIA, XYPN team for trading/ops/compliance
Comprehensive Portfolio Solutions

2026 Planning

XYPN Model Management

Passive
Tracker

Globally Indexed

Lowest Cost ETFs

Manager Agnostic

Semi-Active
XYPN Core

XYPN Thought Leadership

Tactical Allocation

Manager Agnostic

Active
Model Manager/DFA

Vetted Managers

XYPN Education

XYPN Implementation

Questions?



Disclosures



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