

# Vestmark Model Marketplace Enhancements Overview

The Vestmark Model Marketplace has seen strong growth over the past three years, and we're continuing to invest in its evolution. These enhancements make it easier for managers to showcase their strategies, for subscribers to discover and adopt them, and for all participants to unlock more value from the platform.

## For Providers:



**Improved Interface:** Model Navigation & editing with 1:1 tax harvest securities



**Self-Service Reporting:** Take advantage of access to real-time sleeve-level subscription usage and historical data.



**Fee Oversight:** Review fees directly within the platform

## For Subscribers:



**Marketplace Access:** Browse & subscribe directly



**Enriched Data Built-In:** Morningstar data & provider ADVs



**Subscription Visibility:** Easily review active model subscriptions and their associated fees online.

## Why It Matters:

These upgrades position our Model Marketplace as a centralized, modern distribution hub — giving managers broader visibility, subscribers faster access, and everyone a more efficient, scalable experience.

### What's Next:

- ✓ **Model of Models Support:** Product distribution at scale with single source of delivery
- ✓ **Automated Alerts:** Stay notified of ADV changes
- ✓ **Risk Reduction:** Streamlined workflows derisk trading

Vestmark is building the **future of model delivery.**

Our enhancements to our Model Marketplace simplify connections between managers and subscribers — helping firms scale faster, with more transparency and less risk.

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