



BENJAMIN F. EDWARDS®
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FOR IMMEDIATE RELEASE

Edwards Launches 4th Equity Portfolio – ‘Core 40’ -- Focusing on S&P 500

ST. LOUIS, Aug 7, 2024 – The four BFE equity portfolios, including the new Core 40, target stock exposure in value, dividend growth, blended value/growth and growth, and offers clients a wide range of options suitable for varying investment objectives.

Edwards Equity Portfolios

- The CORE 40 strategy complements the other equity and balanced strategies providing clients with core S&P 500 exposure.
- With over \$200 million in assets under management, the portfolios have found a sweet spot with the firm’s advisors looking for competitively priced professionally managed portfolios to meet clients’ objectives.
- BFE Equity Portfolios were created as a solution for advisors and clients looking for a relatively low-cost option to gain exposure to core equity investment styles.
- The strategies are constructed using quantitative factor models that the investment team relies on to screen potential investments.
- The investment team also employs a qualitative approach to ensure proper diversification and prudent portfolio-management practices.
- Each strategy holds 40 stocks and is invested so that respective sector allocations and portfolio characteristics align with the chosen benchmark.
- The Edwards Investment Strategy Team uses Factor Investing, a form of active management that relies on fundamental data to identify investments that align with a specified objective.

About Benjamin F. Edwards

With a legacy spanning 137 years over six generations of the Edwards family, Benjamin F. Edwards today is an entrepreneurial wealth management enterprise welcoming client-first, full-service financial advisors to join the firm. Advisors at Edwards seek to render solid investment advice while helping clients develop a plan to reach their goals. The growing national firm is

now in 33 states with 96 locations, with over \$42 billion in assets under management. It remains true to its Golden Rule roots with regard to treatment of clients, financial advisors, employees and all work partners. The home office in St. Louis knows advisors by name and eschews call centers to get advisors' questions answered. Leveraging the firm's distinguished heritage and vision for the future, those who desire can become advisors of the firm's broker-dealer, Benjamin F. Edwards. Alternatively, they can choose an independent affiliation with the firm's registered investment advisor (RIA) Edwards Wealth Management. Edwards's strong fiscal foundation and timeless values enable it to be a firm of "Client-First Service Second-to-None," offering friendly support and thoughtful, tailored investment and planning advice to its treasured clients who make it all possible. The firm has zero debt and is committed to staying independent.