



EQUITABLE

Investment expertise

Learn why financial professionals trust
Equitable Investment Management with your assets

Whether you are an individual, small business owner or retirement plan sponsor, a good financial strategy is designed to help investors pursue life's possibilities and prepare for life's uncertainties

What is Equitable Investment Management (EIM)?¹

Established in

1999

Over the course of two decades, financial professionals have chosen Equitable Investment Management (EIM) portfolios inside Equitable products — and in the last decade, within retail and advisory investment accounts as well.

EIM offers innovative strategies through a lineup of variable insurance portfolios, retail mutual funds and model portfolios.

EIM manages over 120 investment portfolios and underlying separate accounts and has \$123.4 billion in assets under management as of December 31, 2024.²

Our group also:

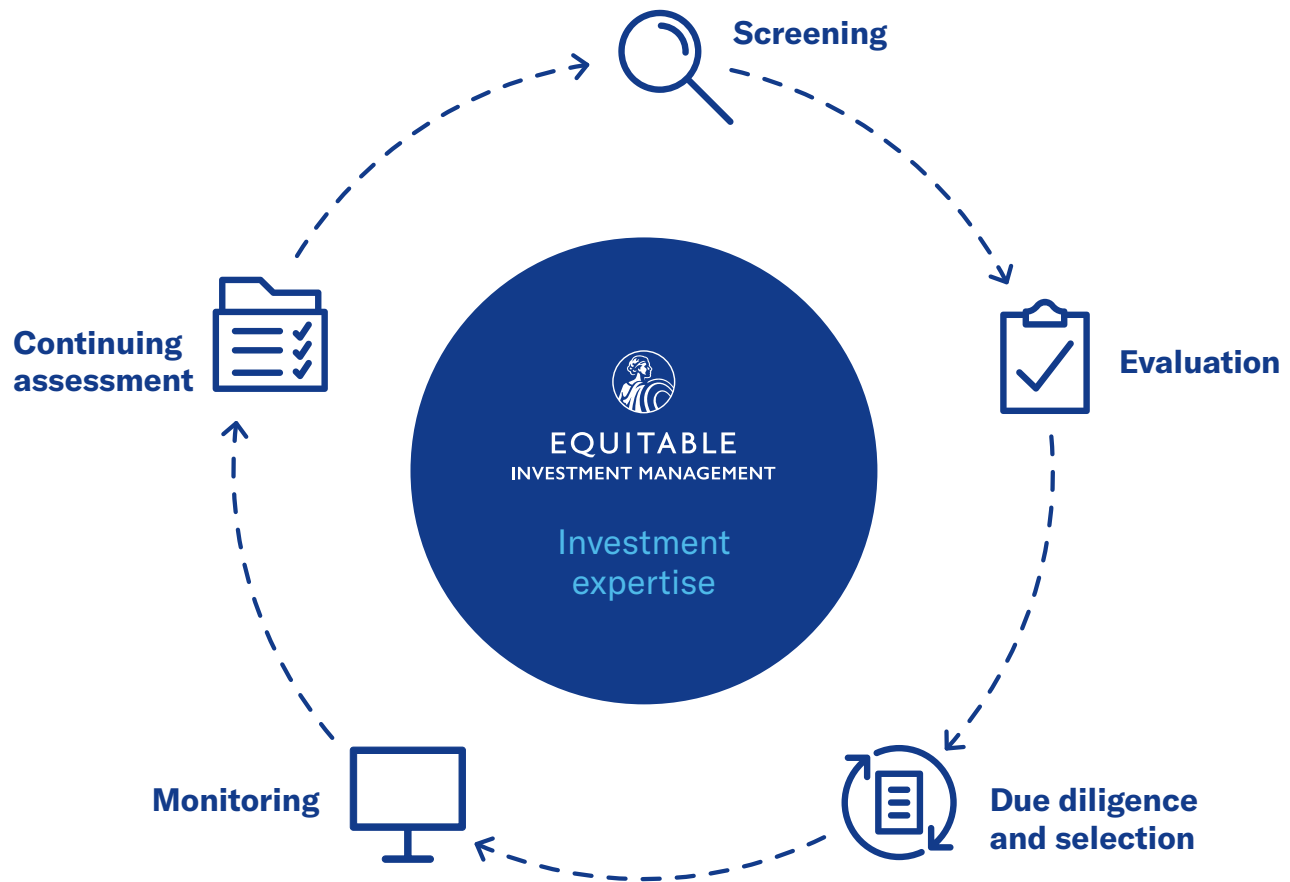
- Hires and oversees more than 40 investment management firms, including some of the largest and most respected in the nation.
- Draws on the expertise of more than 60 dedicated professionals with an average of 15 years of experience in asset management, fund development and operations, including many with critical legal, regulatory or compliance oversight.

Our portfolios and services help corporations, financial professionals and you create and manage wealth to support your goals.

¹ EIM refers to Equitable Investment Management Group, LLC and Equitable Investment Management, LLC.

² Equitable Investment Management as of December 31, 2024. Firmwide assets under management (AUM) includes assets managed by Equitable Investment Management, LLC and its investment advisory affiliate, Equitable Investment Management Group, LLC. Equitable Investment Management Group, LLC's AUM (including offshore assets, but excluding insurance underlying funds-of-funds) was \$122.0 billion, as of December 31, 2024. Equitable Investment Management, LLC's AUM was \$1.5 billion, as of December 31, 2024. Equitable Investment Management, LLC and Equitable Investment Management Group, LLC, referred to as EIM, currently share the same infrastructure and officers and directors. Subject to change at any time.

Our five-step process



With our five-step process, we keep your investment needs at the forefront of everything we do, including how we select and monitor each investment manager and strategy. We do the work so you and your financial professional don't have to. This process allows EIM to offer investment strategies that fit a wide spectrum of your needs.



Passive strategies seek to track the portfolio composition and returns of a market index, minus transaction costs and fees.



Active strategies seek to exceed a market benchmark over time.



Multistrategy funds combine both passive and active styles.



Asset allocation strategies rely on professional managers to automatically diversify and rebalance funds periodically.



Volatility management strategies aim to smooth out the big swings in market prices. For instance, they may periodically decrease exposure to a volatile asset class, or systematically seek securities that are less vulnerable to market downturns.

EIM's offerings

Variable insurance portfolios

Traditionally, only large institutions like pensions, endowments and banks enjoyed access to sophisticated investment opportunities and money management services. However, retirement investors can access those same advantages when they design a well-rounded plan that includes underlying portfolios in an Equitable Financial and Equitable America variable annuity or variable life insurance contract.

1290 Funds®

1290 Funds® is a family of mutual funds advised by EIM, LLC. The funds are structured to uncover opportunities where active management can add the most value, either as a stand-alone investment or as a complement to an overall portfolio. 1290 Funds® gives your financial professional and you access to a lineup of equity, fixed-income and multiasset funds.

Visit 1290Funds.com for more information as well as podcasts featuring our chief investment officer and many of our subadvisor portfolio managers.



Equity funds

Access to stock pickers seeking excess return relative to the market

1290 Avantis® U.S. Large Cap Growth Fund (TNXIX)

1290 Essex Small Cap Growth Fund (ESCJX)

1290 GAMCO Small/Mid Cap Value Fund (TNVIX)

1290 SmartBeta Equity Fund (TNBIX)



Fixed-income funds

Diversification within a fixed-income allocation

1290 Diversified Bond Fund (TNUIX)

1290 High Yield Bond Fund (TNHIX)



Multiasset funds

Diversification from single-asset categories

1290 Loomis Sayles Multi-Asset Income Fund (TNVDX)

1290 Multi-Alternative Strategies Fund (TNMIX)

EIM's offerings

Equitable's Managed Portfolio Strategies³

Model portfolios are designed to serve as a comprehensive investment strategy. EIM offers 12 model strategies with diverse structures and risk profiles.

The Dynamic Mutual Fund and ETF Series of models offers extended diversification, a tactical momentum overlay and opportunistic reallocations.

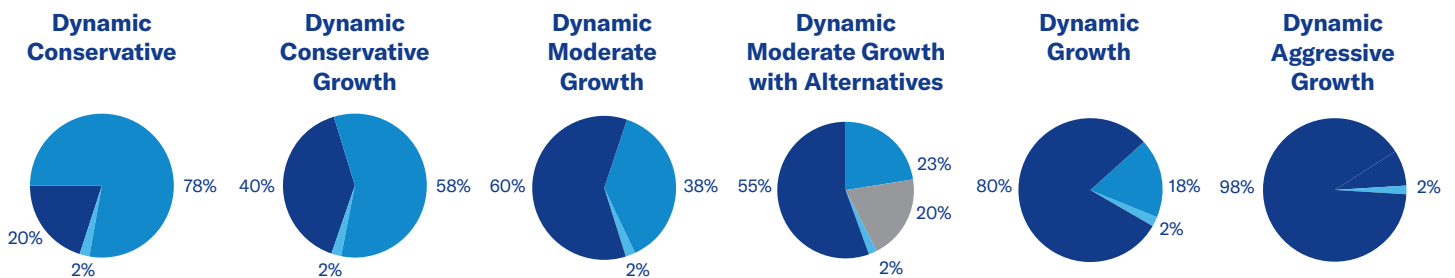
The Strategic Mutual Fund Only Series offers a core investment with a stable strategic allocation.

Each model is overseen by EIM's investment services team and is made up of a diversified selection of underlying mutual funds and/or exchange-traded funds.

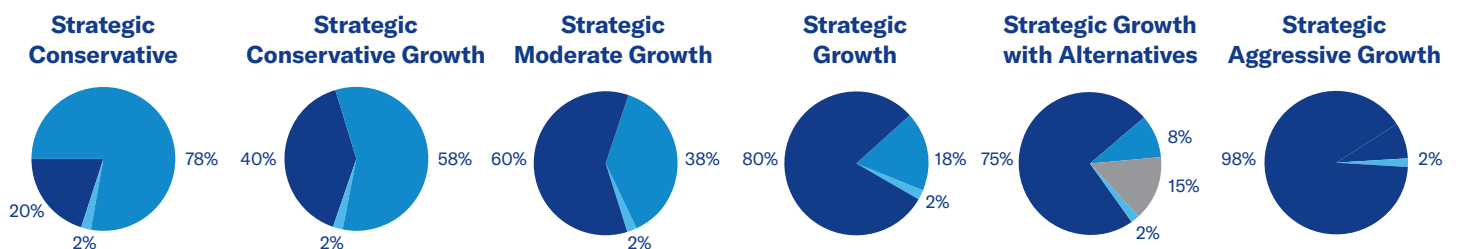
Each model's built-in diversification includes:

Multiple asset classes	Actively and passively managed investments	Dynamic Series makes tactical adjustments in response to momentum shifts, and to compensate for market volatility
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Dynamic Mutual Fund and ETF Series:



Strategic Mutual Fund Only Series



● Equities ● Fixed income ● Alternatives ● Cash

Target allocations subject to change.

³ Model Portfolio Strategies are made available to clients of financial intermediaries, including Equitable Advisors, through LPL Financial's Model Wealth Portfolio (MWP) program on a non-discretionary basis by EIM.

EIM as an innovator

Since its founding, EIM has continued to evolve in order to bring you and your financial professional a robust lineup of investment portfolios, mutual funds and model strategies.

Examples include:

2003	Innovation award for the introduction of a family of asset allocation funds-of-funds.
2009	Innovation award for a patented volatility management strategy that continues today in certain investment options.
2013	Introduced unique investment structure with subadvised, ETF and retail mutual fund combinations in allocation models for insurance products.
2014	Launched 1290 Funds®, retail mutual funds with institutional subadvisors.
2020	Launched Managed Portfolio Strategies combining active and passive underlying holdings in, initially four, now 12 models.

EIM subadvisor partners

A dedicated team of EIM professionals screens, selects and oversees each variable insurance portfolio and mutual fund subadvisor, focusing only on investment managers with a proven track record and strategies that meet strict criteria.



Helping you pursue life's possibilities. To get started today, contact your financial professional.

Important information

Clients should consider the charges, risks, expenses and investment objectives carefully before purchasing a variable annuity, variable life insurance product, a mutual fund or a model portfolio strategy. For an EQ Advisors Trust or 1290 Funds® prospectus containing this and other information, clients should contact a financial professional or visit equitable-funds.com or 1290funds.com, and read it carefully before investing or sending money.

The investment strategies discussed in these materials include mutual funds, variable annuity, variable life insurance products and model portfolios, which entail certain risks. The investment strategies are subject to the volatility of the financial markets, including that of the underlying investment asset class, with respect to certain strategies that employ an asset allocation model. Diversification may not protect against market risk, loss of principal or volatility of returns. An investment may be risky and may not be suitable for an investors' goals, objectives and risk tolerance. Investment returns and principal value will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Mutual funds are subject to the risk that the securities markets will move down, sometimes rapidly and unpredictably, based on overall economic conditions and other factors, which may negatively affect the fund's performance.

Equitable Investment Management Group, LLC (EIMG) is a wholly owned subsidiary of Equitable Financial. EIMG provides investment advisory services to certain variable investment options, or portfolios, underlying life insurance and annuity products offered by Equitable. Equitable Investment Management, LLC (EIM LLC) is an indirect, wholly owned subsidiary of Equitable Holdings, Inc., and provides fund administration services to the portfolios. Equitable Investment Management includes both EIM LLC and EIMG. EIMG and EIM LLC are also affiliates of Equitable Advisors and AllianceBernstein L.P. (AB).

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Mutual funds, variable annuities and variable life: • Are not a deposit of any bank • Are not FDIC insured • Are not insured by any federal government agency • Are not guaranteed by any bank or savings association • May go down in value

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