EQUITABLE

Managed Portfolio Strategies

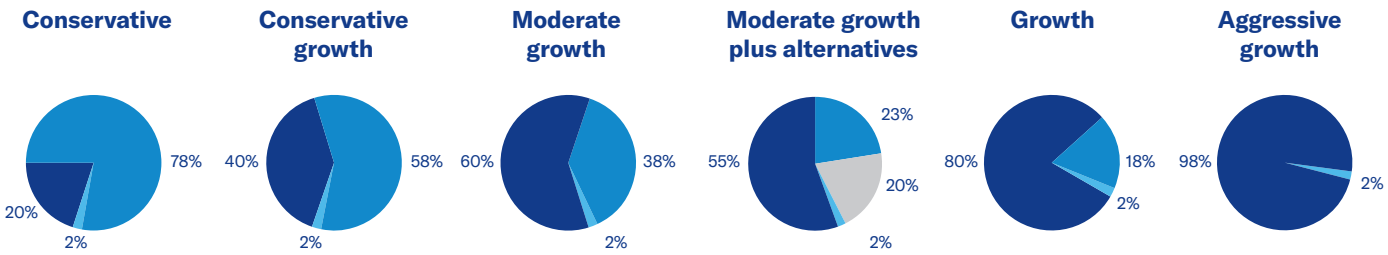
$1 billion in AUM[1]

1 Reflects Managed Portfolio Strategies (MPS) assets under management (AUM) by Equitable Investment Management, LLC as of June 30, 2026. MPS AUM is a subset of EIM-firmwide AUM and is subject to change at any time.

Managed portfolio strategies — model options

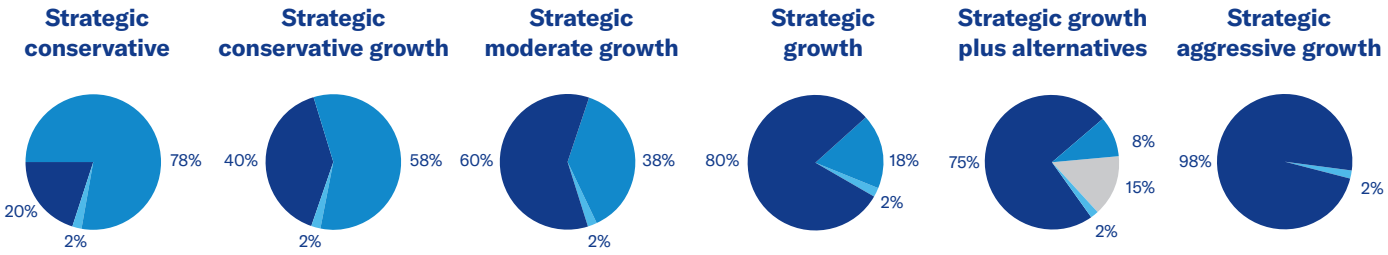
Dynamic Mutual Fund and ETF Series — $10,000 minimum

Short-term tactical positioning is implemented to add value within asset classes and across asset classes. The portfolios in the Dynamic Series utilize a composite measure of momentum to identify favorable cross-asset opportunities.



Strategic Mutual Fund Only Series — $10,000 minimum

The mutual fund-only series offers a strategic focus that seeks to capture long-term risk premiums in diverse asset classes and geographic regions.



● Equities ● Fixed income ● Alternatives ● Cash

Active funds

- 1290 Avantis U.S. Large Cap Growth Fund
- 1290 Diversified Bond Fund
- 1290 Essex Small Cap Growth Fund
- 1290 GAMCO Small/Mid Cap Value Fund
- 1290 High Yield Bond Fund
- 1290 Multi-Alternative Strategies Fund
- 1290 SmartBeta Equity Fund
- AB Small Cap Growth Portfolio

Passive ETFs (Dynamic Mutual Fund & ETF Series)

- iShares® Broad USD High Yield Corporate Bond ETF
- iShares® Core S&P Total U.S. Stock Market ETF
- iShares® Core S&P U.S. Growth ETF
- iShares® Core S&P U.S. Value ETF
- iShares® Edge MSCI Minimum Volatility Global ETF
- SPDR® Bloomberg 1–3 Month T-Bill ETF
- SPDR® Portfolio Developed World ex-US ETF
- Vanguard FTSE Emerging Markets ETF
- Vanguard Intermediate-Term Corporate Bond ETF
- Vanguard Total Bond ETF

Passive funds (Strategic Mutual Fund Only Series)

- iShares MSCI Total International Index Fund
- iShares MSCI U.S. Aggregate Bond Index Fund
- iShares S&P Total U.S. Stock Market Index Fund

An investor should consider the investment objectives, risks, charges and expenses of each underlying investment carefully before investing. To obtain a prospectus which contains this and other information, please see 1290funds.com for more information on the 1290Funds®, AB.com for more information on the AB Small Cap Growth Portfolio iShares.com for iShares ETFs, SSGA.com for SPDR ETFs and Vanguard.com for Vanguard ETFs. Read the prospectus carefully before investing.

The Managed Portfolio Strategies and underlying funds are not insured by the FDIC, are not guaranteed bank deposits and are subject to investment risks, including loss of principal.

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The Managed Portfolio Strategies currently consist of mutual funds advised by EIM LLC, affiliated mutual funds not advised by EIM LLC, such as AB funds, and unaffiliated funds and ETFs. The underlying investments that compose the models are available only in the share class offered on LPL Financial's MWP program when made available through the Managed Portfolio Strategies; therefore, the underlying investments or share classes through the models may not necessarily be the least expensive. In some cases, the underlying investment funds in the Managed Portfolio Strategies may have a lower cost share class available on a stand-alone basis for purchase outside of the models or that may be available to other types of investors. Use of Managed Portfolio Strategies will result in the payment of fees to the affiliated mutual funds, 1290 Funds® and AB funds, in the Managed Portfolio Strategies, as provided for in the prospectus of each such underlying investment. The fees received from investment in the affiliated mutual funds will be shared by various affiliates, including Equitable Investment Management and AB, involved in distributing and advising the models and the affiliated funds in Managed Portfolio Strategies. The Managed Portfolio Strategies' allocations and data are subject to change. Asset allocation strategies are subject to the volatility of the financial markets, including that of the underlying investment options' asset classes. Asset allocation and 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 a client's goals, objectives and risk tolerance. Investment returns and principal value will fluctuate so that a client's shares, when redeemed, may be worth more or less than their original cost.

Investments in the underlying funds will be subject to the risks associated with the securities and other investments in which the underlying funds invest, and the ability of each strategy to meet its investment objectives will directly depend on the ability of the underlying funds to meet their investment objective. The underlying investments 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. Equity securities held in underlying investment funds involve the risk that the value of the securities may fluctuate, sometimes widely fluctuate, in response to changes in a company's financial condition as well as general market, economic and political conditions and other factors. Investing in foreign securities involves specific additional risks, including, but not limited to, currency risk, political risk and risk associated with varying accounting standards; investing in emerging markets may accentuate these risks. An underlying investment that invests in smaller companies generally leads to greater price volatility. An underlying investment's fixed-income investments are subject to fluctuations in price due to issuer and credit quality, rising interest rates and inflation.

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In the LPL Financial Model Wealth Portfolios (MWP) program, the LPL Financial Overlay Portfolio Management Group is the client's investment manager and implements trades for the client's account based on model portfolio investment recommendations it receives from EIMG.

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