



Clarify complexity, provide solutions at scale

All of our capabilities.
One operating system.

September 2024

Introducing MosaiQ by Franklin Templeton™, a comprehensive technology platform that:



Creates an integrated and adaptable process for managing robust multi-asset portfolio solutions



Allows global teams of analysts, researchers, and portfolio managers to collaborate asynchronously throughout the entire investment process



Leverages the insights and experience of Franklin Templeton Investment Solutions (FTIS) and incorporates their extensive knowledge of asset classes, manager research, portfolio optimization, and award-winning goals-based research

MosaiQ
by Franklin Templeton™

Benefits of using MosaiQ

Scales with ease

Unifies portfolio construction, management, and analysis into a single platform, creating integrated apps from a broad set of investment tools

Built-in flexibility

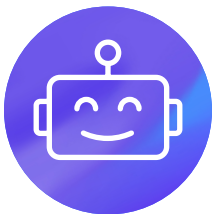
Offers a modular approach to express different investment philosophies and manage diverse strategy types

Seamless integration

Merges with clients' existing systems, such as risk models and OMS, through API connectivity

Streamlined data management

Consolidates diverse investment data with automated validation processes to substantially reduce manual oversight and mitigate risk



Meet Pixel, your AI co-pilot

An AI-powered assistant that guides users through MosaiQ using natural language. Pixel democratizes multi-asset investing by educating users and explaining complex concepts like multi-asset optimization and factor decomposition.

Clarify complexity. Provide solutions at scale.

A multi-asset operating system that adapts to diverse workflows and philosophies, empowers collaboration across investor roles, boosts capabilities, and scales efficiency to better achieve client goals.

MosaiQ in action

Capabilities	Problem Faced	MosaiQ Solution
Strategic Asset Allocation	Did recent market disruptions impact our strategic asset allocation weights?	On-demand long-term capital market expectations baked into portfolio optimizations.
Dynamic Asset Allocation	How do I implement tactical tilts across suites of similar portfolios?	Parent/child portfolios , where a view in one portfolio can automatically be implemented across the board, letting PMs focus on investing, not iterative portfolio construction.
Manager Allocation	Which managers are the optimal fit for our specific objectives?	On-demand factor analysis offers insights into what drives the performance of managers and how they can be combined to create portfolios incorporating only intended active risk.

All investments involve risks, including possible loss of principal. Equity securities are subject to price fluctuation and possible loss of principal. Active management does not ensure gains or protect against market declines.

Investment strategies which incorporate the identification of thematic investment opportunities, and their performance, may be negatively impacted if the investment manager does not correctly identify such opportunities or if the theme develops in an unexpected manner.

To the extent a strategy focuses on particular countries, regions, industries, sectors or types of investment from time to time, it may be subject to greater risks of adverse developments in such areas of focus.

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