



Allspring Global Investments Expands Remi SMA Platform

Active core plus fixed income, international EAFE index, and blended index capability now available

Charlotte, N.C., June 5, 2024—Allspring Global Investments, a leader in customized manager-traded separately managed accounts (SMAs) and direct indexing, today announced several enhancements to its custom SMA platform, Remi. Advisors and their clients can now access the firm’s actively managed core-plus fixed income strategy, named CoreBuilder Core Plus, in an SMA wrapper through Remi. In the direct indexing space, Allspring also announced the addition of an international EAFE index to its platform and now has the ability to blend equity indexes. Through these enhancements, clients gain additional flexibility across Allspring’s active and passive, equity, and fixed income SMAs in one platform via Remi.

“These latest innovations represent a big step in creating a truly comprehensive solution,” said Manju Boraiah, co-head of custom SMA Investments. “The addition of CoreBuilder Core Plus, together with our existing active CoreBuilder Municipal Income strategy offering, means we’re delivering active management across the spectrum in a major asset class that arguably benefits most from it—fixed income. Combine that with the ability to blend equity indexes in direct indexing, now including international EAFE, in a customized SMA, and you’ve got a compelling offering for investors who may benefit most from customized portfolios.”

Advisor adoption of Remi and Allspring’s suite of customized SMA products continues to build momentum with assets surpassing \$3.1 billion as of the end of the first quarter spurred by net inflows of \$245 million. Remi is available at the largest RIA custodians and TAMPs and is on three of four wire houses with the fourth currently onboarding. Further, in the first quarter of 2024, Allspring saw a 146% increase in Remi users versus the same period a year prior.

Allspring’s overall scale within SMAs is significant, with more than \$66 billion in assets, making the firm the 11th-largest SMA provider in the United States.

“These new enhancements represent our commitment to the needs of financial advisors and our desire to be a leader in solving their most complex client challenges,” said Katie D’Angelo, head of Global Relationship Management. “If our tax-managed and customized solutions can help advisors meet the needs of their wealthiest clients, we can help them grow. This is at the core of why we built a comprehensive tool like Remi.”

About Remi

Remi is Allspring Global Investments’ customized separately managed account and direct indexing solution with more than \$66 billion in assets under advisement.* Remi offers personalized active and passive investment strategies for an individual advisory client’s preferences, employs a full



range of strategies to help enhance returns through continuous tax management, and simplifies the process of transitioning legacy portfolios to customized solutions in a risk- and tax-aware manner. For more information, please visit www.allspringglobal.com/capabilities/remi-tax-management.

About Allspring

Allspring Global Investments™ is an independent asset management firm with more than \$570 billion in assets under advisement*, over 20 offices globally, and investment teams supported by more than 410 investment professionals. Allspring is committed to thoughtful investing, purposeful planning, and inspiring a new era of investing that pursues both financial returns and positive outcomes. For more information, please visit www.allspringglobal.com.

*As of March 31, 2024. Figures include discretionary and non-discretionary assets.

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Bond values fluctuate in response to the financial condition of individual issuers, general market and economic conditions, and changes in interest rates. Changes in market conditions and government policies may lead to periods of heightened volatility in the bond market and reduced liquidity for certain bonds held in the portfolio. In general, when interest rates rise, bond values fall and investors may lose principal value. Interest-rate changes and their impact on the strategy can be sudden and unpredictable. Loans are subject to risks similar to those associated with other below-investment-grade bond investments, such as credit risk (for example, risk of issuer default), below-investment-grade bond risk (for example, risk of greater volatility in value), and risk that the loan may become illiquid or difficult to price. The use of derivatives may reduce returns and/or increase volatility. Certain investment strategies tend to increase the total risk of an investment (relative to the broader market). This strategy is exposed to foreign investment risk, high-yield securities risk, and mortgage- and asset-backed securities risk. Consult the embedded fund's prospectus for additional information on these and other risks. The CoreBuilder Municipal Income strategy is exposed to high-yield securities risk and municipal securities risk. A portion of the strategy's income may be subject to federal, state, and/or local income taxes or the alternative minimum tax. Any capital gains distributions may be taxable.



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