

NEWSLETTER



DEAR FINMASON CLIENT,

As 2026 begins, we wanted to take a moment to thank you for your partnership and share a brief update on how FinMason has continued to evolve over the past year — and where we're heading next.

REFLECTING ON 2025

Across wealth, asset management, insurance, and platform partners, we saw a clear shift in how firms are thinking about analytics: less as a static reporting layer, and more as a core digital capability that supports growth, distribution, and better client outcomes/engagement.

DEEPER, MORE FLEXIBLE ANALYTICS

We expanded the breadth and depth of our analytics engine — including enhanced risk, performance, portfolio diagnostics, and scenario analysis — giving teams more precision and control without increasing complexity.

FASTER TIME TO VALUE THROUGH APIS

Adoption of FinMason's APIs accelerated as clients looked to embed analytics directly into their own platforms, tools, and workflows. Whether supporting advisors, product teams, or end investors, our API-first approach continued to reduce build time and internal engineering burden.

ANALYTICS THAT DRIVE REAL BUSINESS OUTCOMES

From tax-deferral or annuity calculators to reporting and client-facing experiences, clients increasingly used FinMason analytics to improve engagement, increase adoption, and support distribution and product strategy — not just compliance or reporting needs.



OUR BUSINESS TODAY

FinMason remains focused on one core mission: **making institutional-grade analytics easy to access, easy to integrate, and easy to scale.**

Today, we support clients by providing:

- A modern analytics infrastructure delivered via APIs and configurable tools
- Coverage across asset classes, portfolio construction, risk, performance, and diagnostics
- Flexible deployment models that fit your technology stack — not the other way around
- A partnership approach that aligns analytics with business, product, and growth objectives

Just as important, we continue to invest heavily in reliability, data quality, and client support — the foundations that make analytics usable at scale. We had a number of successes in 2025 that we wanted to share.



NOTABLE ENGAGEMENTS IN 2025



- FinMason replaced a publicly traded research system as a global analytics engine for digital ecosystem & portfolio construction at a top 10 global asset & wealth manager.
- We rolled out multiple annuity & insurance calculators for investment vehicles like RILA, tax deferral, lite retirement, Tax Deferral Calculator, 1035 Annuity Exchange Calculator, QLAC Optimization Calculator, RILA Calculator, Annuity, Fixed Income and Portfolio Projections
- FinMason released an asset owner focused, validation and reconciliation engine that focuses on integration with custody, performance, or third-party data sources to ensure clean and validated data.

LOOKING AHEAD TO 2026

Heading into 2026, our roadmap is centered on helping clients:

- Deliver richer digital experiences to advisors and end investors
- Access faster, more actionable insights from their data
- Extend analytics across more use cases — from product development to distribution and client engagement
- Expand data aggregation, validation and reporting for asset owner community. Continue to create a “single source of truth” for the ecosystem
- FinMason capabilities expanding further into private assets
- Deeper fixed income analytics for portfolio analysis
- Wider range of analytics from contribution to risk/return and monte carlo analysis.

We’re excited about what is ahead, our continued focus on helping clients scale, modernize their tech stack and grateful to be working alongside teams that are rethinking how analytics can create differentiation in a competitive market.

We welcome the opportunity to connect with you as the year kicks off.

Thank you again for your continued trust in FinMason. As always, we welcome your feedback and look forward to building together in the year ahead.

**WARM REGARDS,
THE FINMASON TEAM**