



Draft 1 for Review

EAB INVESTMENT GROUP ANNOUNCES PARTNERSHIP TO OFFER INSTITUTIONAL RISK-MITIGATION SOLUTIONS

PHILADELPHIA, [Month] [Day], 2021 – [EAB Investment Group](#), an SEC-registered investment advisor providing a series of proprietary alpha-generating and risk-mitigating strategies to advisory clients, announced today that it is collaborating with asset management company [Easterly](#) to form [Easterly EAB Risk Solutions LLC](#) and offer a Hedged Equity Strategy and other risk-mitigation solutions.

“In today’s volatile markets, a key priority for institutional investors is to manage risk in accordance with their mandates,” said Edward Boll, Founder of EAB Investment Group and Easterly EAB Risk Solutions. “We apply our experience in the markets to use derivatives and other option-based risk mitigation techniques as the foundation for innovative, complex solutions that provide needed volatility dampening in investment portfolios.”

Easterly EAB uses defensive equity and derivatives strategies that reduce drawdowns and correlation risks in declining markets while enabling clients to remain invested and participate in rising ones. The Hedged Equity Strategy, for instance, combines a long S&P 500 core equity position with option-based risk mitigation techniques to reduce downside volatility and improve correlation patterns within portfolios.

Easterly EAB’s investment solutions are managed by investment professionals with expertise in both equity investments and options. Arnim S. Holzer, Global Macro Strategist and Client Portfolio Manager at Easterly EAB and a member of its Investment Committee, said, “In today’s market environment, institutional investors don’t have the luxury of simply stepping away when volatility strikes. One recent study found that missing just the 10 best days the markets were open during the past 20 years would have reduced returns by more than half.¹ Investors shouldn’t try to time the markets but instead remain invested and seek to control risk, and our strategies are intended to help them do so.”

“Last year, the S&P 500 Index gained or lost one percent or more on 42 percent of the days the markets were open.² That’s not volatility – that’s normality, and investors need to plan for it,” said Easterly EAB Managing Principal Darrell Crate. “Moreover, good and bad days often occur in close proximity. In 2020, the second-worst and second-best days of the year followed one

¹ Footnote included for proofing purposes only: [JP Morgan Asset Management Guide to Retirement](#), 2021 Edition. Page 43, “Impact of Being Out of the Market.”

² Footnote included for proofing purposes only: “[10 Things You Should Know About Stock Market Volatility](#),” by The Hartford Funds

right after the other.³ It is difficult for investors to time such markets, and so they need to stay invested, retaining equity exposure while reducing downside risk and equity correlation.”

About EAB Investment Group

EAB is an SEC-registered investment company that provides a series of proprietary alpha-generating and risk-mitigating strategies for retail, institutional and family office investors. Headquartered in Philadelphia with offices in New York, EAB is a sub-advisor on the James Alpha Managed Risk Domestic Equity Fund and the James Alpha Managed Risk Emerging Markets Equity Fund. The firm works as a risk advisor and seeks to add value by developing strategy, product and hedging solutions using proprietary methods.

About Easterly EAB

With roots dating to 2011, Easterly EAB combines the experience and capabilities of [Easterly](#), a private asset management holding company with affiliated managers that offer strategies across a variety of asset classes, with the expertise of [EAB Investment Group](#), an SEC-registered investment company which specializes in hedged equity and derivatives strategies for RIAs as well as hedge funds, family offices and other institutional investors.

Easterly EAB provides diverse risk mitigation solutions for institutional investors. For more on Easterly EAB’s Hedged Equity Strategy as well as its custom solutions including volatility and hedging strategies; beta and correlation hedging; yield enhancement strategies; and the EAB Correlation Defense Index™, please visit <https://www.easterlyeab.com>.

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³ Footnote included for proofing purposes only: [JP Morgan Asset Management Guide to Retirement](#), 2021 Edition. Page 43, “Impact of Being Out of the Market.”