

High-Conviction Stocks. Real-Time Insights. Lower Costs

NextFolio is an asset manager leading the evolution to **Ensemble Active** investing—a data-driven approach that enhances traditional active investing by leveraging machine learning and real-time mutual fund and ETF holdings data to extract high-conviction stock ideas from top institutional fund managers.

The Problem with Traditional Active Management

Diluted Alpha: Low-conviction holdings drag down returns.

High Fees: Investors face multiple layers of active management costs.

Manager Guesswork: Predicting top-performing managers is challenging

Shift to Passive: Over \$2.5 trillion has left active U.S. equity Funds

The NextFolio Advantage

Daily Insights: Identifies top managers' best ideas in real time.

Smarter Forecasting: Ensemble models improve accuracy and outcomes.

Pure Conviction: Diversified portfolios built from managers' strongest picks.

Cost-Efficient: Active stock selection without extra fund fees.

How Ensemble Active Investing Works

1 Analyze

First, **hundreds of funds and thousands of stocks** are analyzed to ensure a robust selection.

2 Build

Next, we combine **machine learning technology** with NextFolio's portfolio construction guidance to construct **high-conviction portfolios**.

3 Finalize

NextFolio's Ensemble Active portfolios are finalized, optimized, and continually monitored with **real-time insights** to focus on what we term **Ensemble Alpha**

Ensemble Active portfolios are available across all market caps and all Morningstar U.S. equity style boxes.



Contact us at info@NextFolio.ai
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