



# Seek Sustainable Yield AND Capital Appreciation

## OUR STRATEGY



The **Swan Enhanced Dividend Income Strategy** focuses on total return, seeking both sustainable income and capital appreciation.



The strategy deploys actively-managed covered call-writing on a quality dividend growth stock portfolio.



This distinct approach combines Swan's decades of options strategy management with O'Shares' expertise in index strategy and development.



## FOR INVESTORS WHO ACTIVELY SEEK MORE

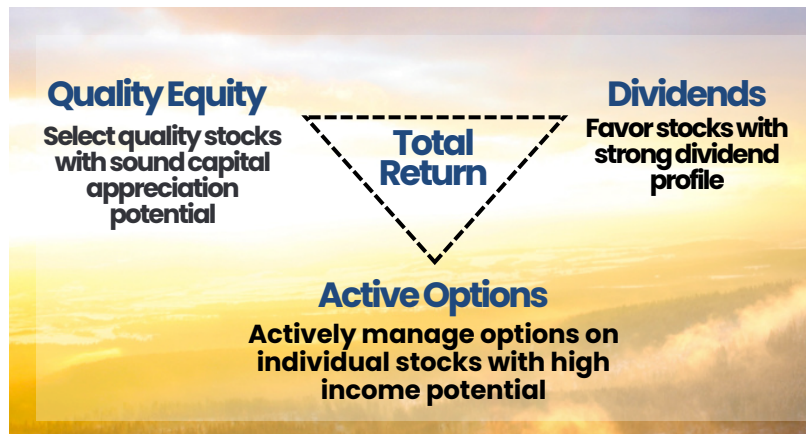
Stand out in a field of passive strategies that are often unable to:

- Adapt to changing market conditions,
- Unduly cap upside potential,
- Erode an investor's capital base over time.

## KEY BENEFITS FOR INVESTORS



Our distinct "active-active" approach offers investors a compelling "dual alpha" enhanced income solution.





# SYNERGY OF EXPERTISE BEHIND A DISTINCT SOLUTION

## INNOVATING FOR INVESTORS

Industry leaders in options strategies and index strategy development join forces to provide investors a distinct and active approach seeking sustainable income and uncapped capital appreciation.

## MANAGER

Swan Global Investments



**Randy Swan**

Founder & Lead  
Portfolio Manager



**Chris Hausman**

Senior Portfolio  
Manager

## INDEX PROVIDER

O'Shares Investments



**Connor O'Brien**

President & CEO



**Kevin O'Leary**

Chairman



## FIND OUT MORE

Questions? We're here to help!  
Scan this to learn more, and  
if you prefer, arrange a time to  
speak with our team

## Important Disclosures

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