

Jacobi secures Series A funding to scale multi-asset investment technology

- *San Francisco-based investment technology firm Jacobi Inc. has secured USD \$10m Series A Funding led by QIC*
- *Funding will support the development of the Jacobi platform and the continued growth of its investment management clientele globally.*

San Francisco, California, September 19, 2022 - Investment technology firm Jacobi Inc. has announced it has raised \$10m USD in Series A funding, led by Queensland Investment Corporation (QIC)

Jacobi Inc. (Jacobi) will use funding to further accelerate the development of the Jacobi platform and expand its team and clientele globally.

QIC joins Jacobi's existing investors; Silicon Valley venture capital firms, Illuminate Venture Partners, 8VC and Western Technology Investment (WTI).

Joining the board of Jacobi Inc will be Crystal Russell (QIC) and Bill Miller (Makena Capital)

Founded in 2014, Jacobi provides its technology to some of the world's largest asset management firms including T.Rowe Price, MFS, LGIM and WTW. Its global client base now represents assets under management over US\$7 trillion.

Jacobi CEO and Co- Founder, Tony Mackenzie said: "We are proud to be backed by the highly respected global investor QIC as we continue to grow our global business. Our valued client base spans some of the world's leading asset managers, owners, investment consultants, RIA's and family offices. Each of these firms have looked to Jacobi for flexible technology that is purpose built for the multi-asset investor".

Mackenzie added: "Our open-architecture means we can configure our solution to each firm's own investment strategy including their capital market assumptions, data, risk engines and optimization techniques - and combine that with dynamic visualization tools for better end-client engagement."

QIC Principal, Crystal Russell said: "We are delighted to be investing in Jacobi on behalf of the Queensland Business Investment Fund. Jacobi is a home-grown success with an exceptional team, world-class product and a global blue chip client base. The asset management industry is undergoing a widespread digitalization with software driven tools enabling more in-depth portfolio analysis and increased client engagement. Jacobi's product is proving to be a critical tool for some of the world's most sophisticated asset managers."

Jacobi's technology transforms front office-to-end-client investment processes enabling portfolio design, analytics, and client engagement. The cloud-based platform provides a powerful and highly customizable suite of tools for designing, managing and visualizing multi-asset portfolios.

For more information, visit www.jacobistrategies.com

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About Jacobi

Jacobi Strategies (Jacobi) provides cloud-based technology to support the design and management of multi-asset portfolios at scale, streamlining investment workflows and enabling dynamic client engagement. Jacobi's open architecture means the platform is highly flexible with users able to integrate their own models, data, analytics and code. Jacobi provides its technology to top-tier global investment firms including asset owners, asset managers, wealth managers and investment consultants. Headquartered in San Francisco, and with offices in Australia and the United Kingdom, Jacobi is led by a team of investment professionals and world-class engineers.

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