

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.

KEY BENEFITS FOR INVESTORS



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



FOR INVESTORS WHO ACTIVELY SEEK MORE

Stand out in a field of passive strategies that often:

- Cannot adapt to changing market conditions,
- Unduly cap upside potential,
- Erode an investor's capital base over time.

Quality Equity

Select quality stocks with sound capital appreciation potential

Dividends

Favor stocks with strong dividend profile

Total Return

Active Options

Actively manage options on individual stocks with high income potential



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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