

inCadense announces its affiliate iH2 Advisors & Company to partner with CAPIS to power international overlay solutions

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inCadense, a global managed accounts provider to the asset and wealth management industry, is excited to announce a strategic collaboration by its affiliate iH2 Advisors & Company with Capital Institutional Services, Inc.

WILMINGTON, Del., Aug. 29, 2025 /PRNewswire-PRWeb/ -- inCadense, a global managed accounts provider to the asset and wealth management industry, is excited to announce a strategic collaboration by its affiliate iH2 Advisors & Company ("iH2"), a SEC registered investment adviser, with Capital Institutional Services, Inc. ("CAPIS") as its outsourced trading desk, reinforcing inCadense's commitment to enabling asset and wealth managers through collaborations with top global partners.

According to A.J. Harper, Managing Partner & Co-Founder of inCadense, "CAPIS is one of the premier outsourced trading services providers globally. By linking iH2 with CAPIS's global trading services, we're streamlining mandate implementation and rebalancing for international asset and wealth managers. This enhances our

ability to deliver the global access, technology, and operational strength international registered investment advisers ("RIAs") need to serve their clients."

"Overlay solutions such as this by iH2 deliver implementation expertise and scalable portfolio rebalancing, empowering RIAs to effectively oversee global ETF model strategies, tailored UCITS managed accounts, and dynamic fixed income and equity portfolios," said Ann Sebert, President & CEO of CAPIS.

Key Highlights of the collaboration include:

- iH2 and CAPIS have established connectivity that integrates with inCadense's digital International Turnkey Asset Management Platform (iTAMPSM), to support global mandates and international separate account strategies implemented for its asset and wealth management partners.
- iH2 gains access to the CAPIS global trading desk extending its ability to implement complex, global separately managed accounts ("SMAs").
- Via this arrangement, CAPIS provides a global outsourced trading solution that covers multiple asset classes and offers 24-hour support for iH2 access to global execution, matching the scope of global strategies empowered via the iTAMPSM platform.
- As asset and wealth managers seek to build sophisticated high yield, global and other fixed income solutions, including Reg. S securities for non-U.S. persons, iH2 can respond to demand from managers actively tilting portfolios towards income solutions.
- The broader collaboration enhances iH2's asset management, overlay services, SMA implementation and managed account customer journey, delivering comprehensive support and greater value to our international advisors.

"Overlay solutions such as this by iH2 deliver implementation expertise and scalable portfolio rebalancing, empowering RIAs to effectively oversee global ETF model strategies, tailored UCITS managed accounts, and dynamic fixed income and equity portfolios," said Ann Sebert, President & Chief Executive Officer of CAPIS. "The integration of our capabilities for RIAs with iTAMPSM, designed to meet the needs of international RIAs, substantially expands access for offshore investors to institutional-grade portfolio management—particularly in high-yield and other less liquid fixed income asset classes that are traditionally challenging to source and manage efficiently for individual investors."

"inCadense is fast-tracking its mission to team up with the industry's top global powerhouses," said A.J. Harper. "This relationship empowers our asset and wealth managers to tailor portfolios and deliver exceptional value to their international clients. With the latest iTAMPSM enhancements, we're not just expanding global access to managed accounts—we're equipping asset and wealth managers with a next-generation platform that delivers a true strategic advantage."

The inCadense network consists of asset and wealth manager clients that leverage inCadense's integrated technology, iTAMPSM platform, global managed account solutions, as well as iH2 investment and overlay services. As a leader in the industry, inCadense provides reach internationally and allows inCadense-powered clients to provide managed account solutions to international and offshore clients. Currently, inCadense and its iH2 affiliate have more than 25 asset and wealth management partners in the U.S., Europe, and Latin American markets.

About inCadense

inCadense empowers asset and wealth managers to manufacture managed account solutions for international investors. Our digital turnkey iTAMPSM platform supports customization of SMAs, UMAs, Public/Private portfolios and ETF models, unlocking access to segregated global mandate investing by individuals, family offices and asset owners. Affiliate iH2 Advisors & Company, a registered investment adviser with the U.S. Securities and Exchange Commission, serves as an overlay manager on iTAMPSM. Via our platform's open architecture with seamless execution connectivity and custody/clearing partnerships worldwide, asset and wealth managers can apply their proven investment process to managed accounts comprised of UCITS, foreign ordinaries, global fixed-income, offshore products, alternatives and private markets while outsourcing operations and technology. We have extensive multi-jurisdictional experience working with managers, creating bespoke solutions to help them swiftly launch new investment products, streamline implementation, and enter new international markets. For more information, please visit www.incadense.com

About CAPIS

CAPIS is an institutional brokerage firm based in Dallas, TX. Founded in 1977, CAPIS remains an independent broker specializing in commission management solutions for asset managers and plan sponsors. For more information, visit capis.com or email us at info@capis.com

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