

true market

WHITE PAPER

28x

ACCOUNTS AND HOLDINGS GROWTH WITHOUT
RAISING COSTS WITH

true market

Introduction

True Market LLC's next-gen EMS and OMS, **powered by a Curated Private Marketplace (CPM)**, streamlines fixed income trading with sub-millisecond processing. Firms can enhance liquidity, ensure compliance, scale efficiently, and cut costs while leveraging trusted tools.

This case study highlights True Market's impact: growing accounts and holdings 28 times with no added headcount for one client since January 2019, plus a major institutional client's record trade volume during their ongoing ramp-up phase.

Ready to scale smarter?

Contact True Market LLC to explore our Workstations.

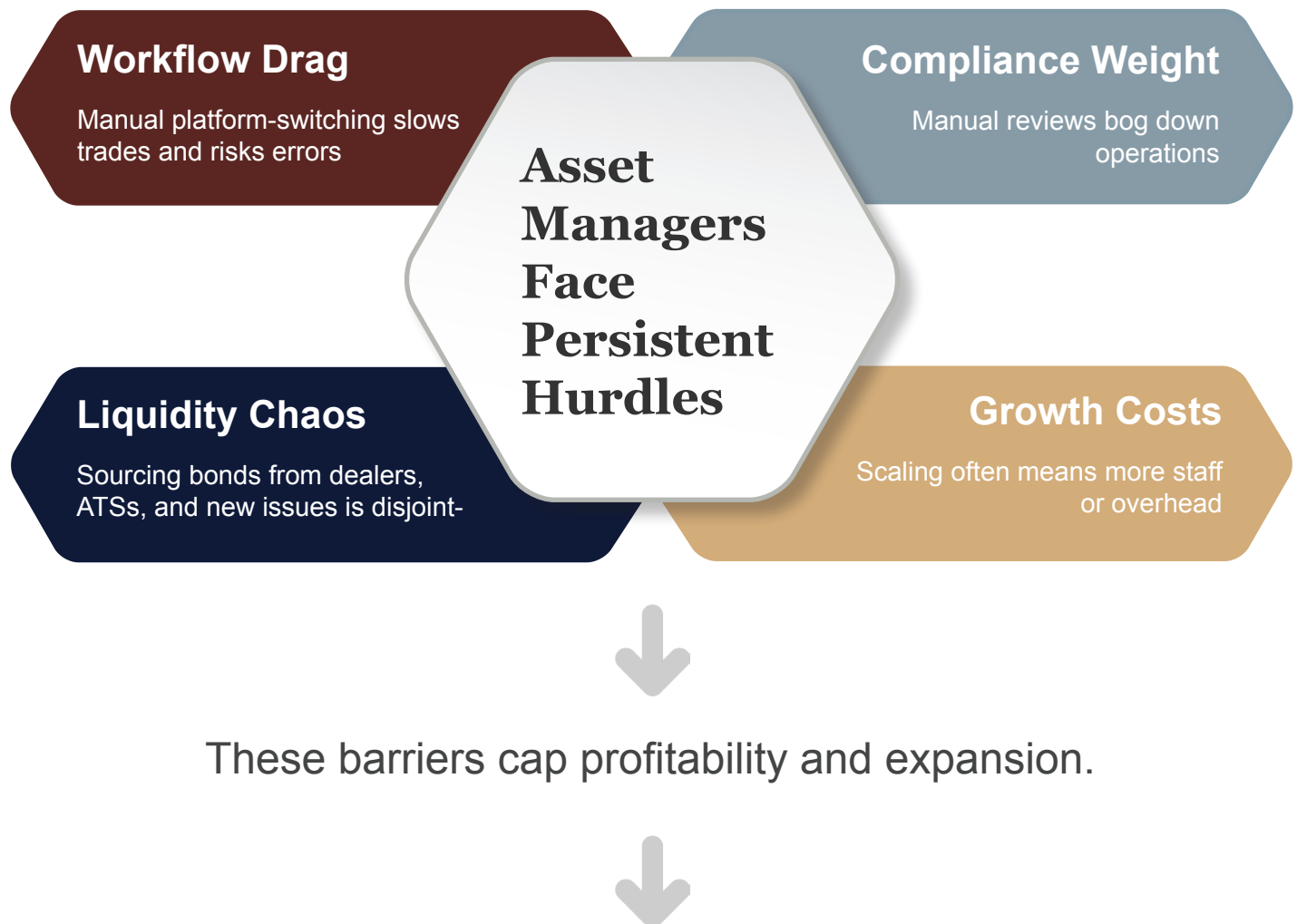
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The Fixed Income Challenge



true market *Rewrites the Rules*

| The True Market Solution

True Market's platform — offering the Independent Workstation (for advisors and RIAs), Institutional Workstation (for large firms), and Hybrid Workstation (for integrators) — **delivers:**

- **Unified Access**
One interface merges live offerings, RFQs, and new issues
- **Real-Time Edge**
Sub-millisecond process and live markets for offers and bids sharpen execution
- **Compliance Automation**
Instant surveillance aligns trades with policies
- **Scalable Technology**
Cloud-based, ISO 27001:2013 certified clusters fit any firm size with competitively priced licensing fees
- **Future-Ready Tools**
CrossX, a tax-loss harvesting engine, promises simultaneous, riskless trades — unlocking major potential as adoption grows

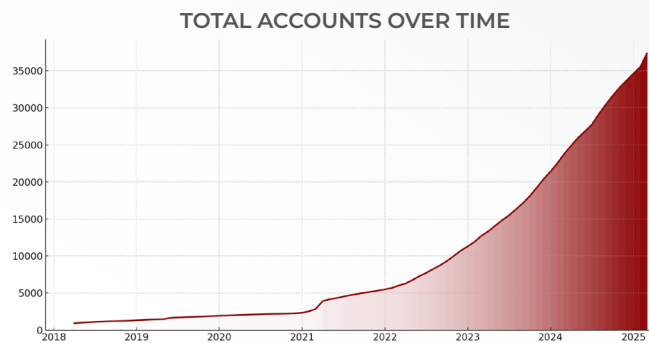
Unlike all-to-all ATS platforms, True Market's CPM lets clients curate dealer networks for tighter pricing and relationships — ***no middleman.***

Proven Efficiency in Action

True Market's clients prove our value:

28x Accounts and Holdings Growth, No Headcount Increase

A leading wealth manager transformed its municipal bond SMAs with our Institutional Workstation. Starting with 1,300 accounts in January 2019, they grew to 35,400 by December 2024, with par value and holdings rising similarly.



Portfolio managers handled this expansion without adding staff, powered by streamlined workflows and precise bond selection.

Wider Wins

A global bank affiliate, a mutual fund leader, and a muni specialist are boosting volume and precision with leaner operations.

Record Volume in Ramp-Up Phase for a Major Institutional Client

A major institutional client leverages True Market's APIs and trade engine via the Hybrid Workstation, achieving record daily trading volume with only a few traders plugged in. Still in their ramp-up phase, this client continues to scale, showcasing True Market's capacity to drive high-volume efficiency.

The Head of Fixed Income at an Institutional Client shared:

“ True Market is best-in-class technology allowing us to scale our muni SMA business using our existing team. We're already seeing amazing results, and we're just getting started. ”

Beating Legacy Bottlenecks

Investor Tools Perform is a staple, but its legacy architecture lacks the processing capability to handle growing complexity, slowing trades and risking stale data.

True Market's sub-millisecond processing speed and custom-built adapters integrate seamlessly, removing those bottlenecks with reduced internal resource demands and costs for clients.

These results show True Market scales portfolio complexity and trading volume **without added overhead.**

Why True Market Stands Out

True Market redefines efficiency:

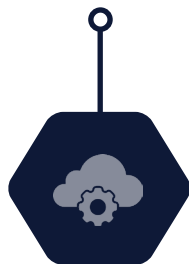
Live Markets Lead

Real-time offers and bids — the only platform doing both — cut quote clutter



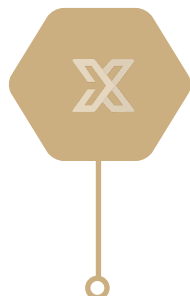
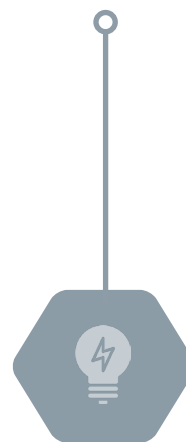
Open APIs with Superior Speed

Over 50 APIs, powered by sub-millisecond processing, sync seamlessly and outstrip legacy systems like Perform, slashing development costs and client resource needs with our custom adapter



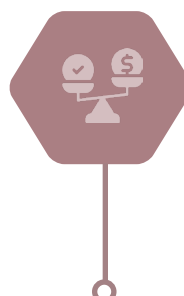
Smart Execution

Real-time alerts and portfolio-driven trading grab the best bonds



CrossX Potential

A tax-loss harvesting tool poised to revolutionize returns with riskless, simultaneous trades — game-changing once critical mass hits



Cost-Effective Scale

Competitively priced licensing fees fit all, from Independent Workstation SaaS to enterprise solutions

From SMAs to global desks, True Market delivers now and innovates for tomorrow.

| The Future of Fixed Income Trading

True Market's expansion across fixed income classes heralds a shift: **growth without resource bloat.**



Clients growing accounts and holdings 28 times with no headcount hikes since January 2019, alongside record volume via integration, prove it works today.



Tomorrow, tools like CrossX promise even bigger wins.

The future of fixed income trading is lean, fast, and forward-thinking. **True Market leads the way.**

CALL TO ACTION

Ready to scale smarter?

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true market **More Accounts. More Volume. Same Costs.**