



NEWS RELEASE

# SS&C ALPS Advisors Expands Capabilities into Semi-Transparent ETFs

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Blue Tractor and GSI Capital Advisors partnership will support expansion

WINDSOR, Conn. and DENVER, Oct. 8, 2020 /PRNewswire/ -- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC) today announced that ALPS Advisors, Inc. has partnered with Blue Tractor Group and GSI Capital Advisors to expand its business into semi-transparent ETFs. SS&C ALPS has filed a short form exemptive relief application with the Securities and Exchange Commission (SEC) to offer semi-transparent ETFs powered by Blue Tractor's Shielded Alpha<sup>SM</sup> Semi-Transparent ETF Structure.

"We are committed to delivering strategies to improve investment outcomes for our clients," said Laton Spahr\*, President of SS&C ALPS Advisors. "The ability to customize investment product structures defines the future of active management. Our new relationships with Blue Tractor and GSI Capital Advisors are key strategic components as we expand our solutions for innovative, alpha-generating boutiques."

Blue Tractor's Shielded Alpha ETF structure is a wrapper that facilitates the management of actively managed portfolio strategies within an ETF rather than a traditional mutual fund. Along with the benefits of an ETF — including potentially lower trading costs<sup>1</sup>, greater tax efficiency<sup>2</sup> and intra-day trading liquidity<sup>3</sup>— Blue Tractor's proprietary structure is designed to safeguard an advisor's active portfolio management and trading strategy.

"SS&C ALPS Advisors has led the industry by making new and innovative products available to investors," said Terry Norman, founder of Blue Tractor Group, LLC. "We're thrilled to be working with them, helping to support the introduction of these active portfolio strategies to their clients in a way that benefits both asset managers and investors."

"GSI Capital Advisors is excited to be partnering with SS&C ALPS Advisors and Blue Tractor to develop a new and



innovative investment product that allows small and large investors access to some of the industry's most successful investment managers and our proprietary investment strategy," said Craig Leupold, CEO of GSI Capital Advisors.

For more information, please visit [www.alpsfunds.com](http://www.alpsfunds.com).

<sup>1</sup>Ordinary brokerage fees apply.

<sup>2</sup>Please consult your tax advisor for further assistance.

<sup>3</sup>Liquidity refers to how quickly an asset can be bought or sold in the market.

\*Registered Representative of ALPS Distributors, Inc.

ALPS Advisors, Inc., ALPS Distributors, Inc. and ALPS Portfolio Solutions Distributor, Inc. are affiliated.

ALPS Portfolio Solutions Distributor, Inc., FINRA Member.

## About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 18,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale, and technology. Additional information about SS&C (Nasdaq: SSNC) is available at [www.ssctech.com](http://www.ssctech.com)

## About SS&C ALPS Advisors


SS&C ALPS Advisors, Inc., a wholly-owned subsidiary of SS&C Technologies, Inc., is a leading provider of investment products for advisors and institutions. Headquartered in Denver, CO with over \$11 billion under management as of September 30, 2020, ALPS Advisors is an open architecture boutique investment manager offering portfolio building blocks, active insight, and an unwavering drive to guide clients to investment outcomes across sustainable income, thematic and alternative growth strategies. For more information, visit [www.alpsfunds.com/](http://www.alpsfunds.com/).

## About Blue Tractor

Blue Tractor Group, LLC develops proprietary solutions to facilitate novel exchange-traded fund products. Blue Tractor's Shielded Alpha<sup>SM</sup> ETF structure (patent pending) permits active portfolio management within an ETF wrapper, while fully shielding a fund's proprietary alpha strategy. More information is available at [bluetractorgroup.com](http://bluetractorgroup.com).

## About GSI Capital Advisors

GSI Capital Advisors LLC is an investment manager with proven and focused expertise capitalizing on investment opportunities in publicly traded real estate securities, primarily REITs. The firm has a seasoned leadership and portfolio management team with extensive industry experience. Led by Craig Leupold and Nicholas Tannura, GSI Capital Advisors is management-owned and headquartered in Newport Beach, CA.

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