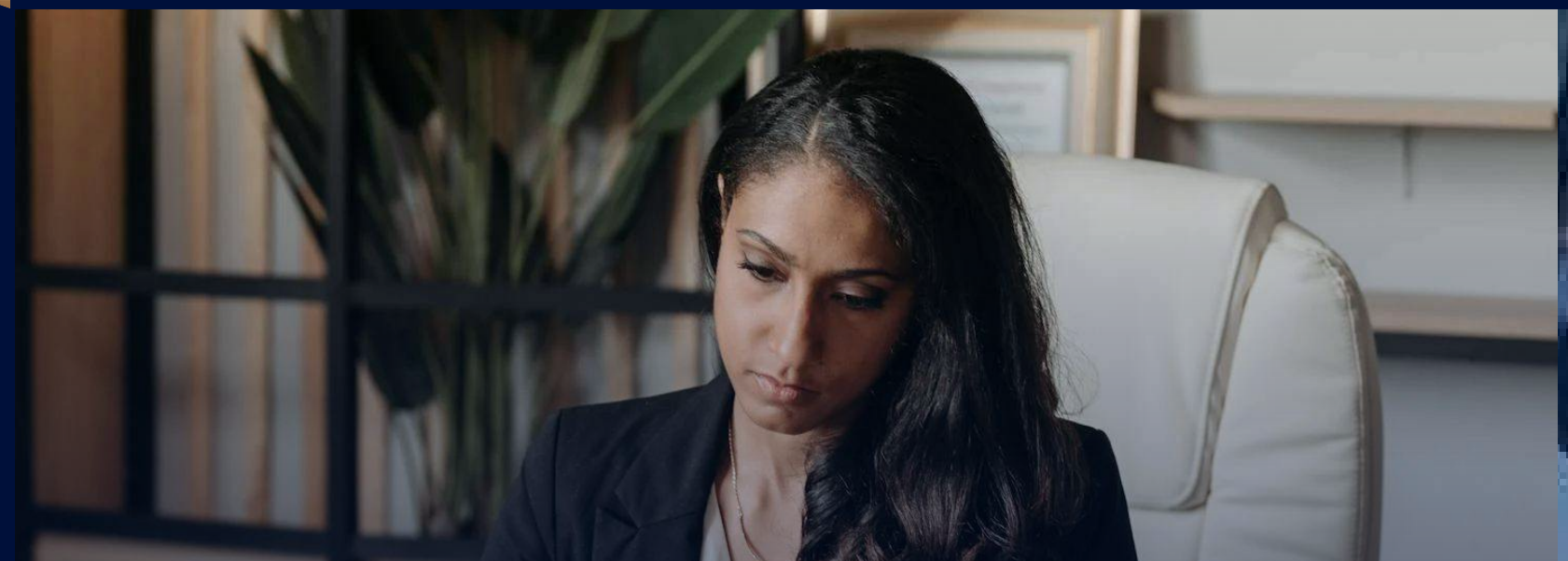




Brand Guidelines



Envision Clarity, Spotlight Outliers.

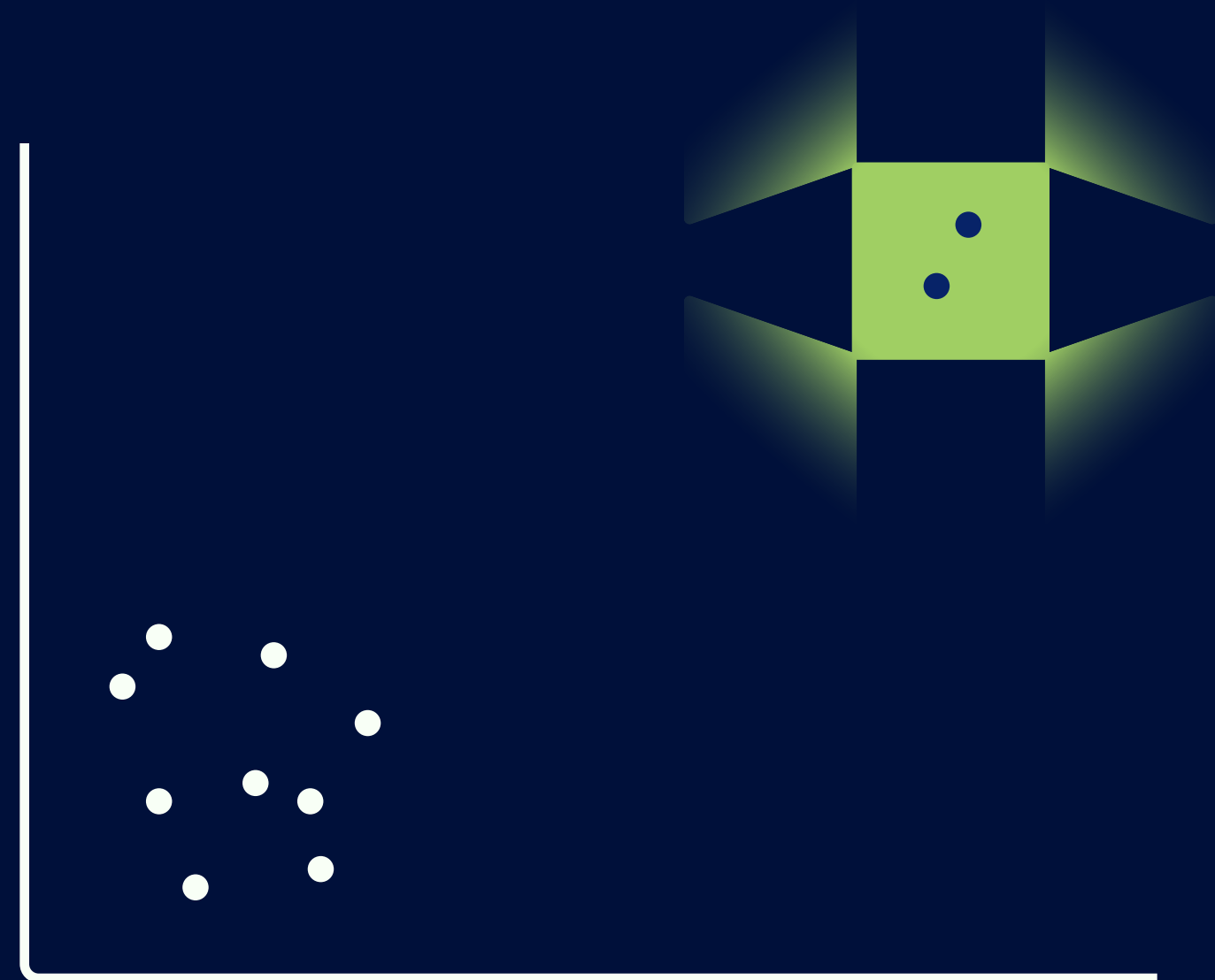
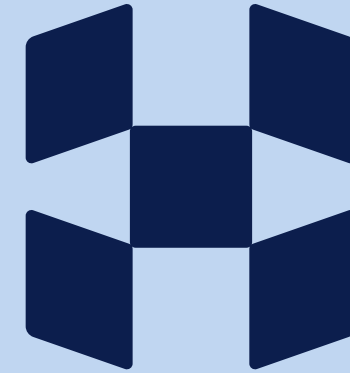


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- Perform®
- IndexManager™
- CreditScope®
- MerrittResearch

Content Pillars

Content pillars are core themes, representing the key subjects communicated consistently across channels. They ensure a cohesive strategy, communicate value, and engage the target audience effectively.

Expertise & Authority

As the undisputed industry leaders, we have the experience and perspective to deliver comprehensive capabilities for streamlining, scaling and sparking transformative possibilities for fixed-income investing. Clients count on us for economic forecasts, bond market trend analyses, deep insights, and much more.

Client-Centric Solutions

Driven by a thorough understanding of our clients' challenges, we enable transformative levels of efficiency and innovation through low-touch trading and streamlined processes. Our innovative technology is matched by the degree to which we care about our clients' success, along with the availability of dedicated support people to help whenever needed.

Differentiators & Reputation

Investortools is the gold standard in fixed income investing. Our dealer network, ability to leverage historical performance data, comprehensive slate of solutions, market connections, client loyalty, industry accolades, and market position are unsurpassed.

Purpose

What

We provide software, analytics, data, and expertise for fixed-income analysis and decision-making allowing our clients to grow their businesses rapidly and profitably.

How

Our subscription SaaS model is designed to cultivate customers for life with five best-in-class experiences housed in one platform, decreasing dependencies on multiple applications needed for daily operations.

We customize, collaborate, and prioritize the relationship with the client, treating them as valued partners in success. We lead with relationships that are built upon a foundation of trust and razor-sharp focus on client success. We leverage our expertise, technological capabilities, dealer network, and deep understanding of the challenges that our clients face.

Why

We believe in drawing upon the full depth and breadth of our resources to have a positive impact – beyond software - on the companies and people we serve, while helping to optimize possibilities.

Elevator Pitch

(Positioning)

Investortools is a leading financial software company that specializes in the fixed income market. Our industry-leading tools for portfolio management, order management, execution management, credit research, and performance measurement, paired with our high-touch customer service, empower our clients to create customized solutions, enabling them to manage their business with unmatched efficiency. We provide our customers with the confidence and expertise to seize opportunities and achieve their full growth potential.

Top Three Values

Innovation

We leverage the latest technologies to solve clients' problems and expand opportunities.

Integrity

We put our clients first and can be counted on to do the right thing in all circumstances.

Interoperability

Enhanced automations and integrations reflect our commitment to streamlined processes that enable clients to manage their entire investment lifecycle in our software.

Voice & Tone

(Personality)

- Innovative
- Able to solve complex problems
- Well-established

- Provide a high value to our clients (we are NOT an inexpensive option)
- Serious

- Approachable and always willing to engage and help
- Connected
- Industry experts

Words we own

Words and phrases we want to weave in throughout the website.

- Low-touch trading and Portfolio Management Solutions
- Fixed income trading
- Fixed income OMS

- Fixed Income Portfolio management platform
- Perform (as a product)

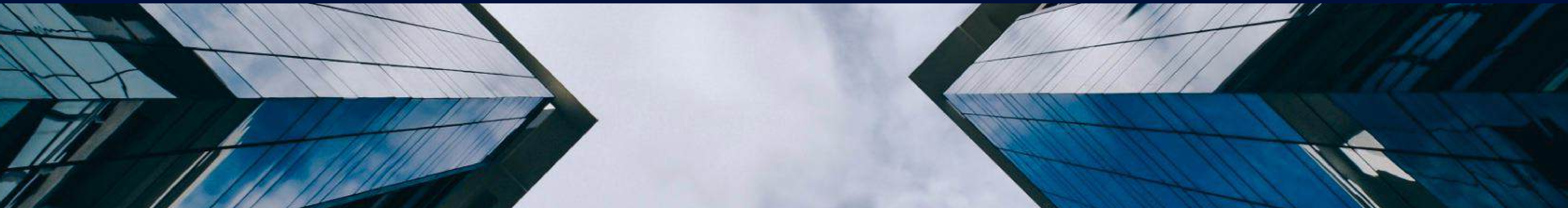
- CreditScope (as a product)
- Municipal bond market

Key messaging

- Growing a Business / Business Growth / Profitably Scaling Your Business
- Efficient Low-Touch Trading and Portfolio Management Solutions
- Expert Client Services
- Future Trends in Separately Managed Accounts
- Gold Standard Bond Analytics
- Cutting-Edge Product Innovations
- Trusted and Comprehensive Credit Data

Differentiators

- High Touch Client Services
- Customization to fit client processes
- System Architecture
- Connectivity to Partner's data and services
- Customers' ability to electronically trade bonds in the platform using the Dealer Network
- Scale and efficiency
- Expertise



The Investortools logo is thoughtfully crafted to symbolize the core values and vision of our brand. The logo formation process is anchored by three key elements: Vision, Scaling, and Uniting.

The Vision

Represented by an eye icon, this element signifies our forward-looking perspective and commitment to innovation and strategic foresight.

Scaling

Illustrated by an expanding design, this component emphasizes our dedication to growth, scalability, and the ability to adapt and expand in a dynamic market.

Uniting

Depicted by a unifying blocks, this part of the logo underscores our mission to bring together diverse tools, data, and insights into a cohesive and powerful platform.

Together, these elements create a balanced and meaningful logo that not only identifies our brand but also communicates our foundational principles and goals. The central mark is a visual anchor, while the adaptable name and color variations allow for a consistent yet versatile brand presence across different products and platforms.



Investortools brand features one main logo alongside several logos for specific products.

While the logo mark remains consistent across all variations, the name and color change to distinguish each product.

Always ensure that the product logos are used according to these guidelines to preserve the integrity and recognizability of our brand.

Product logos should be presented in monochrome when placed on colored backgrounds.





✗ DON'T place colored logos on the colored backgrounds



✗ DON'T fill the whole logo with color



✗ DON'T place colored logos on non-brand colors



✗ DON'T mix multiple brand colors within logo



✗ DON'T fill main Investortools logo with product colors



✗ DON'T remove "BY INVESTORTOOLS" and trademarks



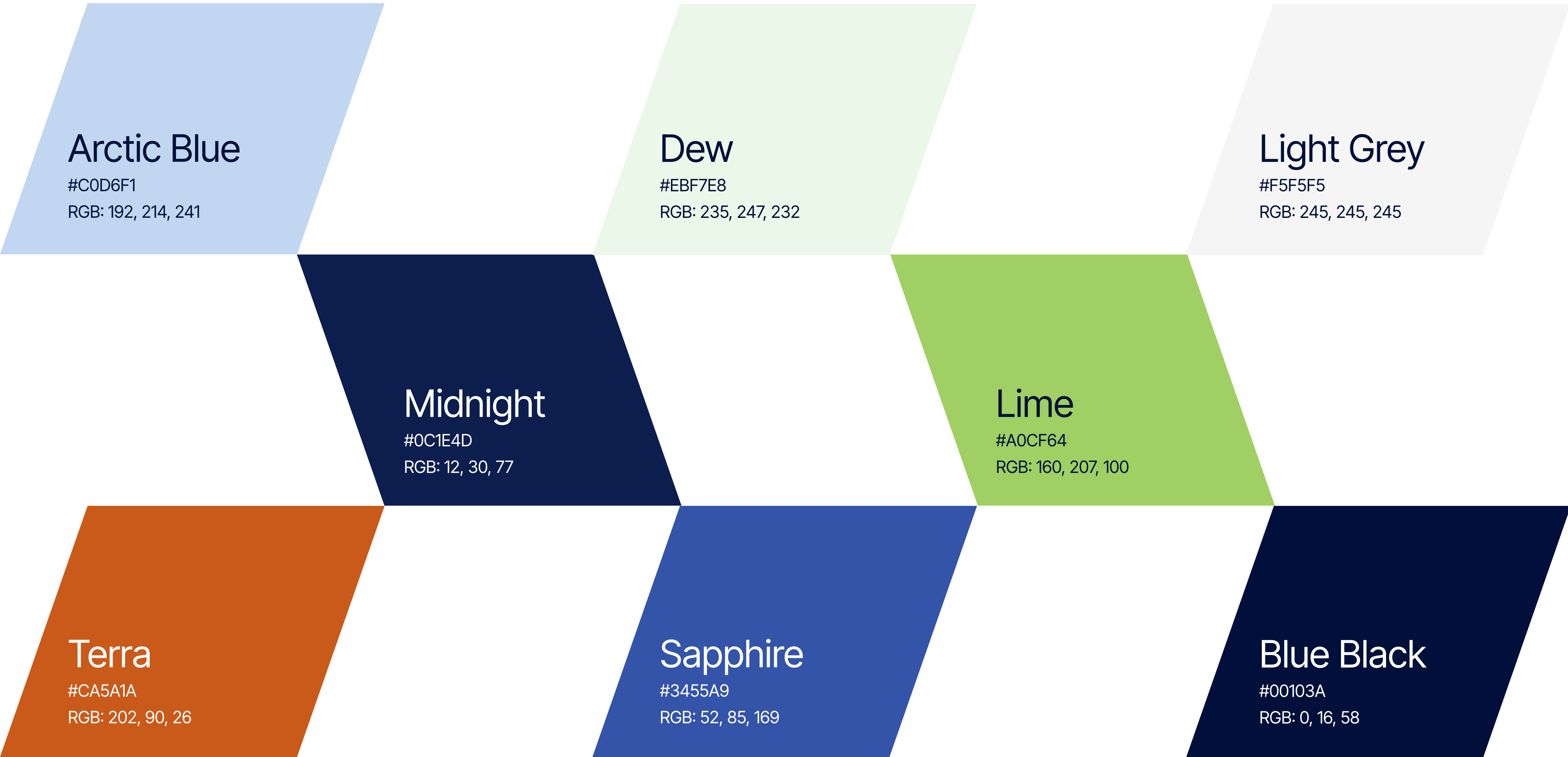
✗ DON'T recolor parts of the main logo mark



✗ DON'T transform, rotate or reposition parts of the logo



✗ DON'T place the logo over non-brand patterns

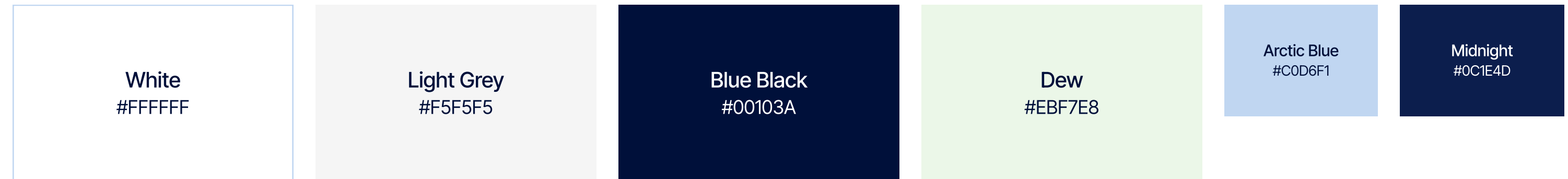


When using the colors specified in this brand guidelines document, it is essential to adhere to the designated purposes to maintain brand consistency.

Certain colors are reserved for specific uses, such as backgrounds or buttons, as indicated.

The other brand colors should not be used for these purposes, as this may compromise the brand's visual identity and coherence.

Backgrounds



Buttons



Text



Logo



When using two color combinations from the brand palette, please refer to the table provided in this document to determine their appropriate usage. The table specifies whether each combination is allowed for text and iconography/graphics, for iconography/graphics only, or if it is not permitted at all.

Text \ Background	Arctic Blue #C0D6F1	Blue Black #00103A	Midnight #0C1E4D	White #FFFFFF	Dew #EBF7E8	Terra #CA5A1A	Sapphire #3455A9	Lime #A0CF64	Light Grey #F5F5F5
Arctic Blue #C0D6F1		Aa	×	×	×	×	Aa	×	×
Blue Black #00103A	Aa		Pattern	Aa	×	×	Aa	Aa	×
Midnight #0C1E4D	×	×		Aa	×	×	×	×	×
White #FFFFFF	×	Aa	Aa		×	Aa	Aa	Aa	×
Dew #EBF7E8	×	Aa	×	×		×	×	×	×
Terra #CA5A1A	×	×	×	Aa	×		×	×	×
Sapphire #3455A9	×	×	×	Aa	×	×		×	×
Lime #A0CF64	×	Aa	×	×	×	×	×		×
Light Grey #F5F5F5	×	Aa	×	×	×	×	Aa	×	



The color combination should NOT be used



The color combination can be used for icons and graphics



The color combination can be used for both text and icons/graphics

Inter Tight

Name	Font	Digital Size	Line Height	Weight	Character Spacing
XXL Heading	Inter Tight	60px	120%	Regular	Auto
XL Heading	Inter Tight	48px	120%	Regular	Auto
L Heading	Inter Tight	40px	120%	Regular	Auto
M Heading	Inter Tight	30px	130%	Medium	Auto
S Heading	Inter Tight	24px	130%	Medium	Auto
XS Heading	Inter Tight	18px	130%	Medium	Auto
Body Large	Inter Tight	18px	140%	Regular	Auto
Body Regular	Inter Tight	16px	150%	Regular	Auto
Body Small	Inter Tight	14 px	150%	Regular	Auto
Buttons	Inter Tight	14 px	100%	Medium	Auto



Focus on images featuring corporate professionals engaged in work-related activities, such as using devices or participating in business communications.



Subjects should appear serious and formal, reflecting a professional demeanor without being overly staged or cheesy.



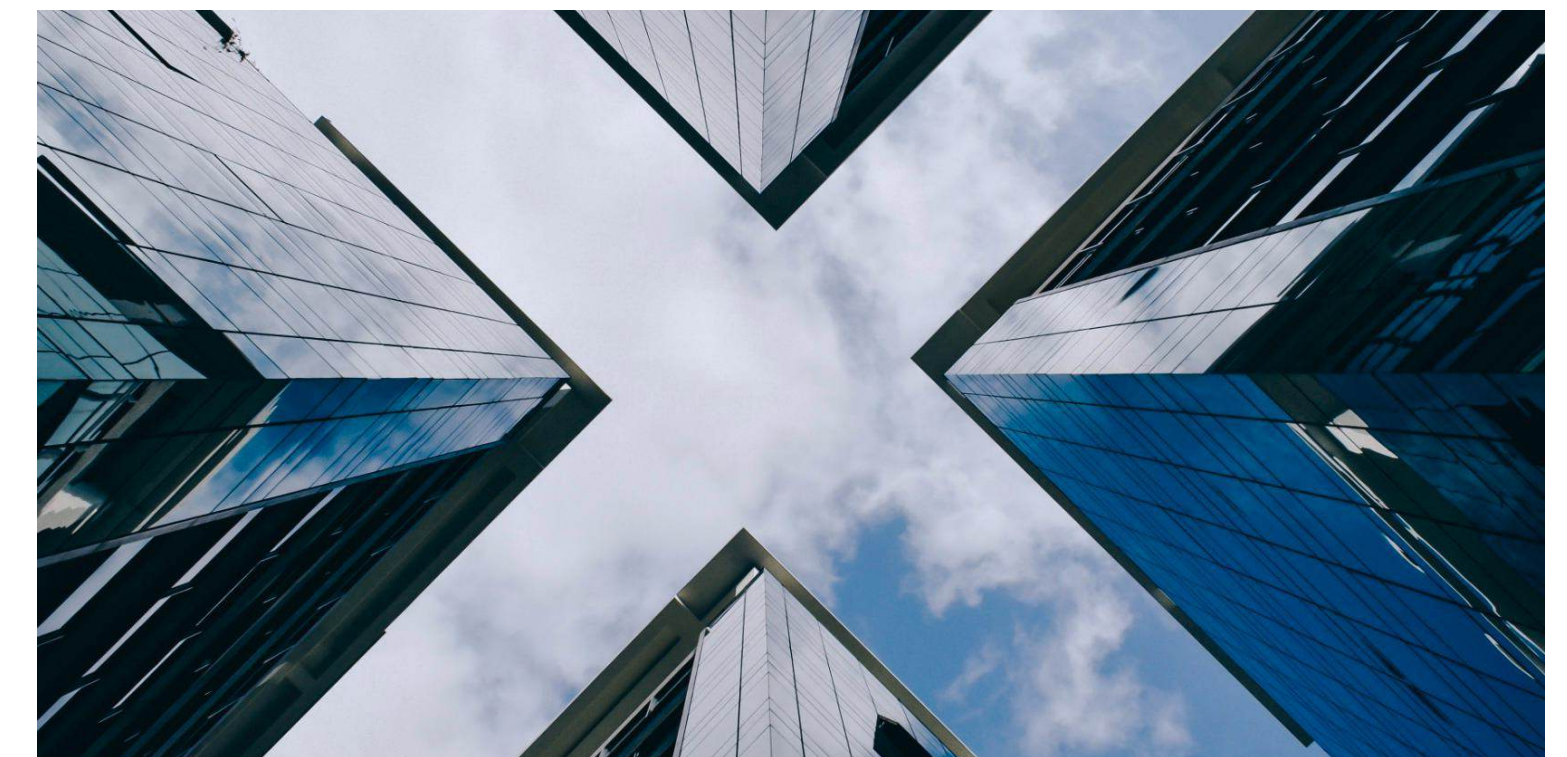
Ensure clothing is business-appropriate.



Maintain an overall color tone that is not excessively warm.



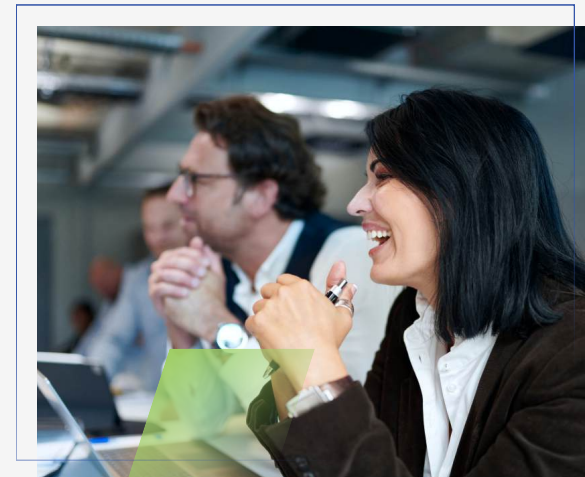
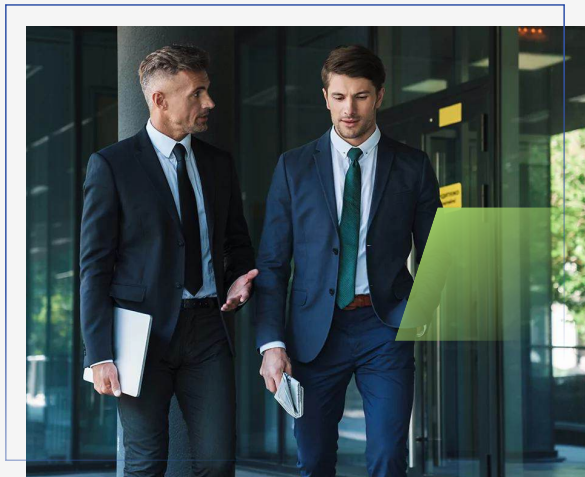
Environments depicted should be corporate and business-oriented, featuring elements such as offices.



Include a mix of photos with people and standalone images of these buildings to create a balanced and cohesive visual narrative.

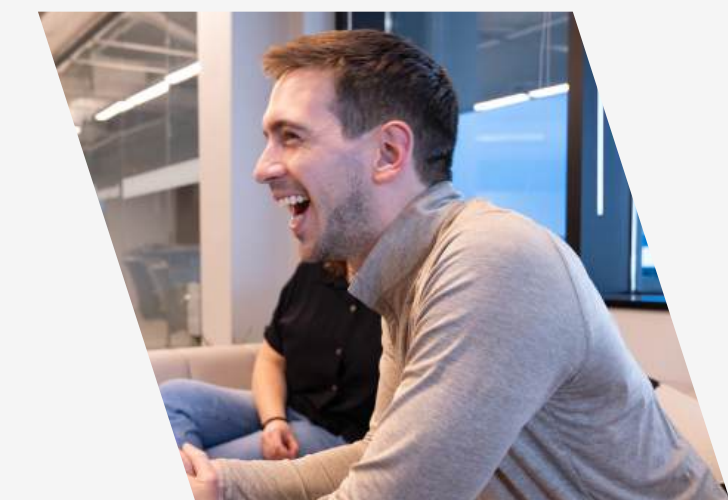
Single Photo Collages

- **Single Photo Use:** Each collage should incorporate only one photo to maintain focus and simplicity.
- **Photo Masking Shapes:** The photo should be masked into either a 4×3 rectangular shape or a slanted rectangle shape.
- **Supporting Graphics:** each image should include a 1-pixel outline frame that is slightly shifted to the top and either the left or right side from the edge of the image. This stroke should be filled with a gradient of #3455A9, transitioning from 100% to 0% transparency. Each image must incorporate a slanted rectangular shape as an accent within the frame. This accent rectangle should be filled with a gradient of #A0CF64.
- **Face Visibility:** Ensure that faces within the photo are not intersected or covered by the graphics.



Multiple Photo Collages

- **Purpose and Placement:** These collages are ideal for sections referring to people, such as the "About" page.
- **Photo Content:** Collages can feature multiple photos of people but must include at least one non-people photo, such as a building or other relevant imagery.
- **Graphics:** Do not include any graphics within these collages to maintain a clean and cohesive look.
- **Photo Shapes:** Use 3×4 rectangular shapes for the majority of the photos. Only one photo within the collage should be masked into a slanted rectangle shape to add visual interest.





40%

Improvement in performance was achieved by Perform® users.



Photos can be used masked in an inverted logo-shape collage, utilizing the negative space shapes from the logo and fading into a gradient matching the background color.

This collage can serve as a standalone element or be integrated into a composition with a short callout, such as statistics.

To maintain visual impact and avoid overuse, this element should be used sparingly and not repeated too frequently within a single piece of design.

Overlaid photos can be used as backgrounds to create visually engaging and dynamic designs.

Ensure the overlay maintains consistency with the brand's visual identity.

70%

Opacity

#00103A

Color

Overlaid photos should not be overlapped with other photos but can be overlapped with graphics. Additionally, two sections with photo overlay backgrounds should not be used side by side to maintain visual clarity and distinction.



Iconography

Iconography should feature simple, outlined designs without end roundings, utilizing straightforward geometric shapes and straight lines. The icons will depict charts, graphs, and abstract financial concepts, ensuring they align with the brand's focus on financial tools and services. Consistency in stroke width and monochrome or brand-approved colors will maintain uniformity. Icons must be easily recognizable and understandable, even at smaller sizes, with adequate spacing around each to avoid clutter. These icons will be used across presentations, websites, and marketing materials to effectively illustrate financial data and concepts while maintaining a professional and cohesive visual style.

[Icon Library Link](#)



Meet the innovative product technology that powers our portfolio management system

Perform®
BY INVESTORTOOLS

Portfolio Management, Analytics, Trading, and Compliance

- Automated workflows
- Separate account management
- Streamline trading with FX integrations

CreditScope®
BY INVESTORTOOLS

Credit Research, Analysis, and Reporting

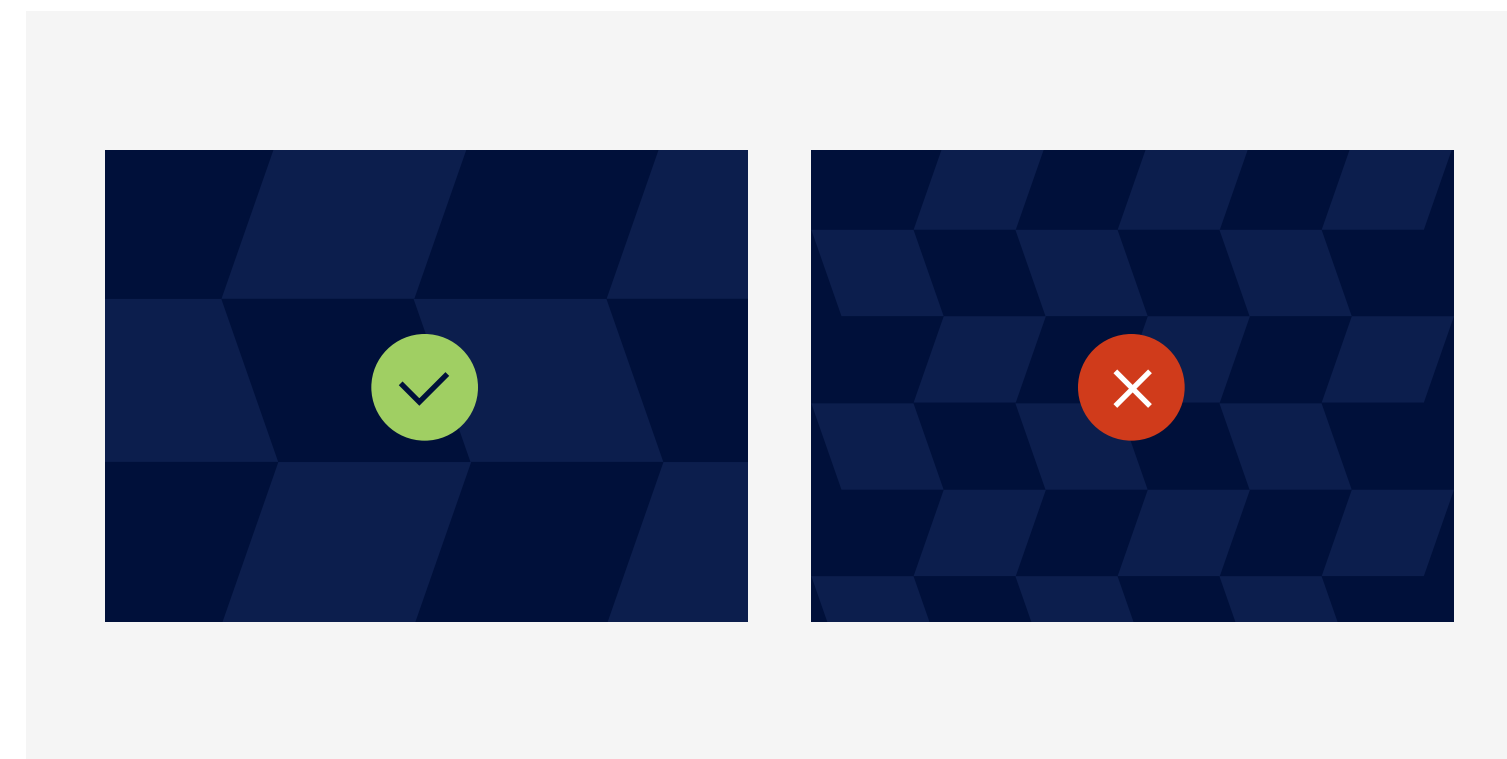
- Massive credit database
- Tools to evaluate and monitor risk
- Processes to manage credit research

Custom Index Manager™
BY INVESTORTOOLS

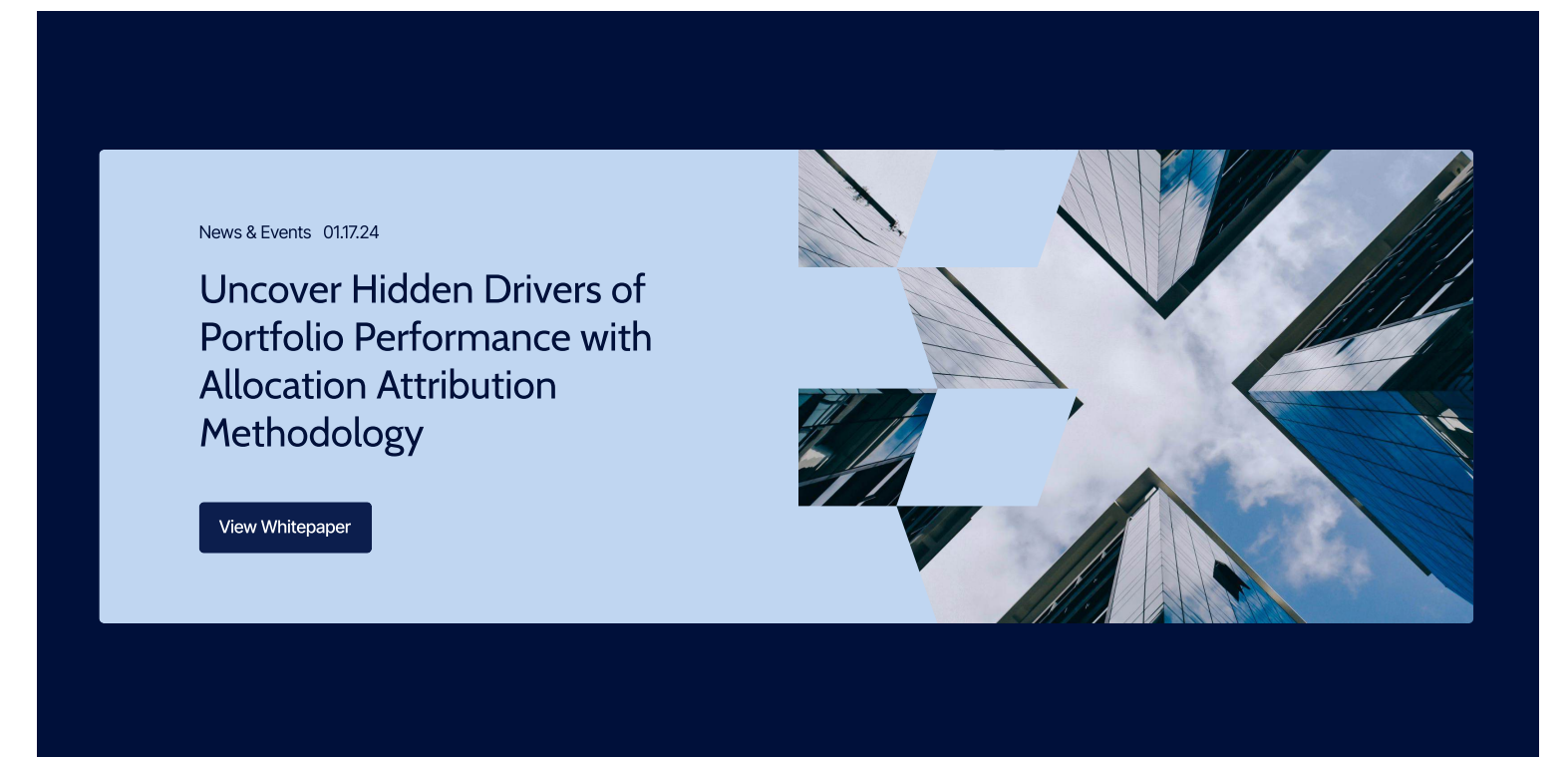
Benchmarking and Performance Attribution

- Allocation attribution reporting
- Index analytics and comparison
- Data transparency

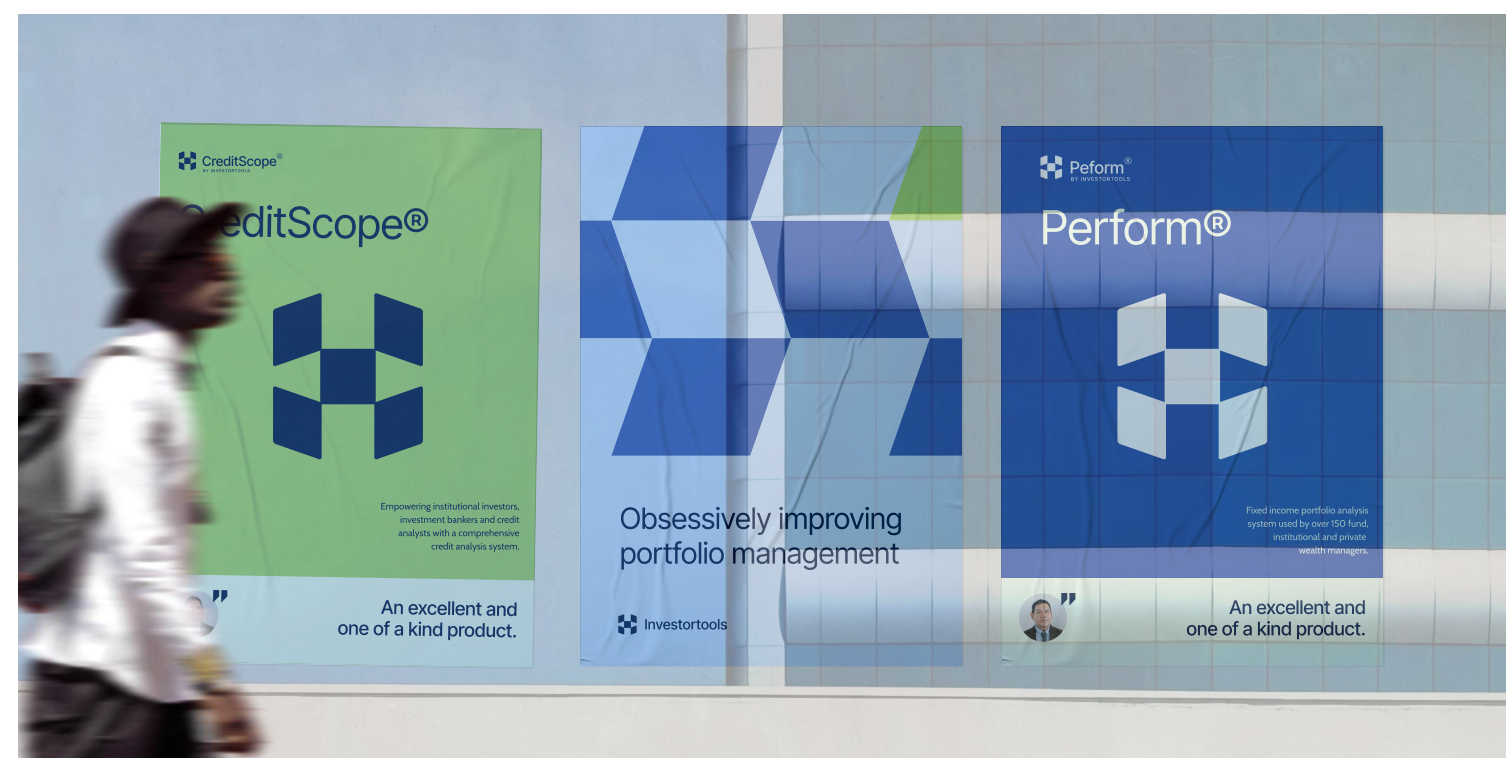
Use the brand pattern to accentuate or highlight specific parts of the design, drawing attention to key elements.



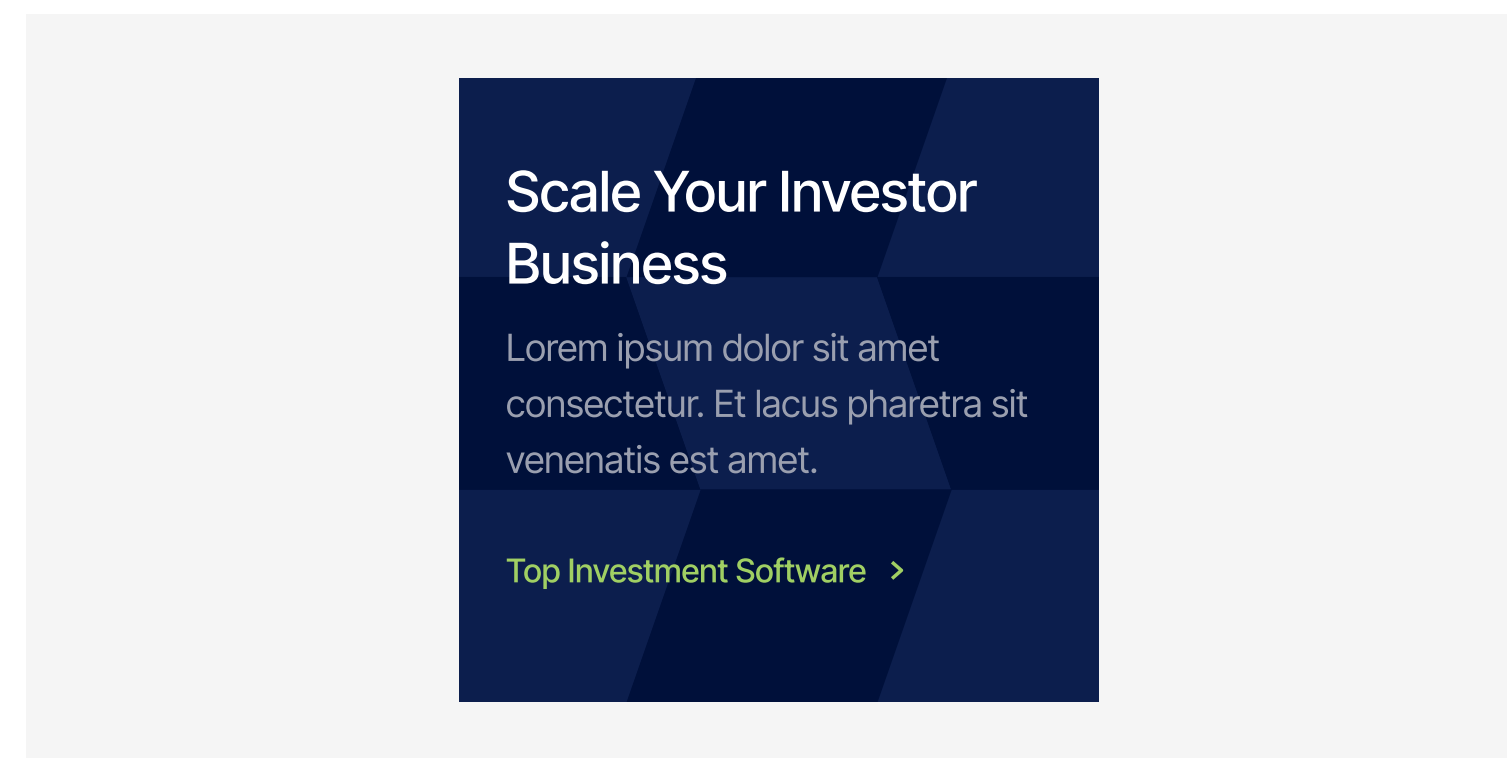
Be mindful of the scale of the pattern. Avoid making it too large or too small to ensure it enhances the design without overpowering or losing detail.



The minimal (2 column) version of the pattern can be used as a transition between a photo and a solid color. Ensure there is no gap to maintain a seamless transition.



One module of the pattern can be highlighted with Lime color or masked with a photo to add a focal point and visual interest.



Logos, text, and icons can be placed over the pattern to integrate branding and information seamlessly. However, do not place other graphics over the pattern to avoid clutter and maintain visual clarity.

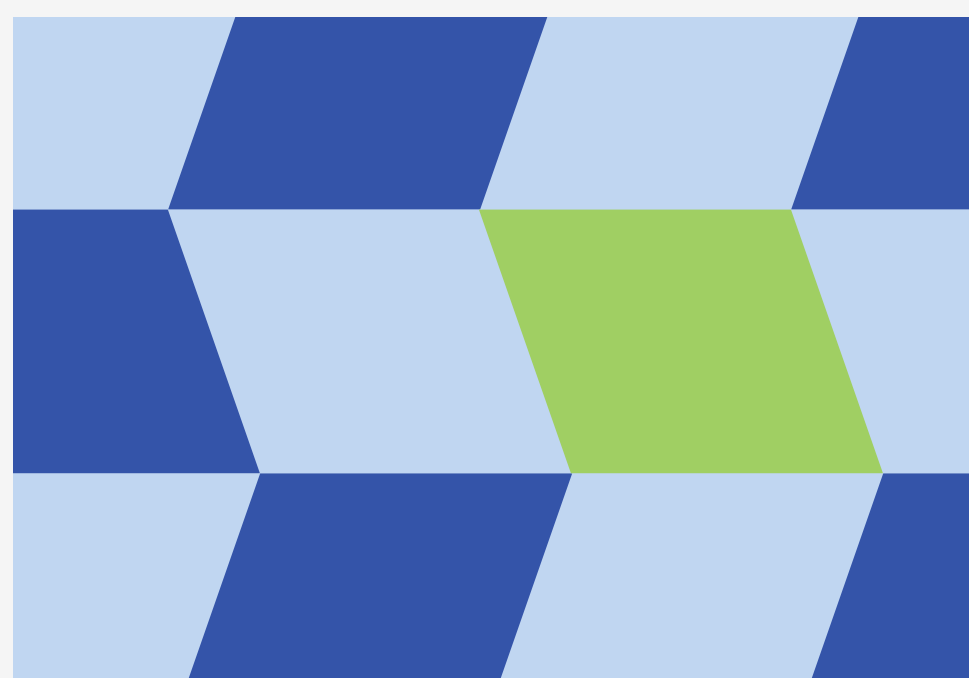


Use the pattern reasonably, preferably no more than once per page, to avoid overpowering the design and maintain a balanced aesthetic.



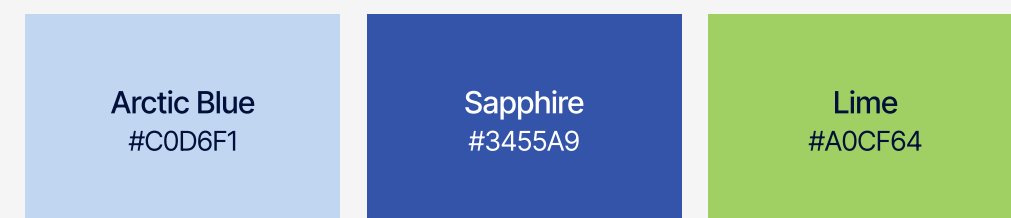
Basic pattern used for backgrounds

Can be overlapped with logos, icons and photography. When not overlapped, one module can be masked with a photo or a Lime color fill.



Standalone accent pattern for print and social

Can NOT be overlapped with any visuals, used as a standalone large scale accent graphic.



Product primary accent color + white

Used on any specific product accent color background with transparent white pattern. Can be overlapped with logos, icons and photography.



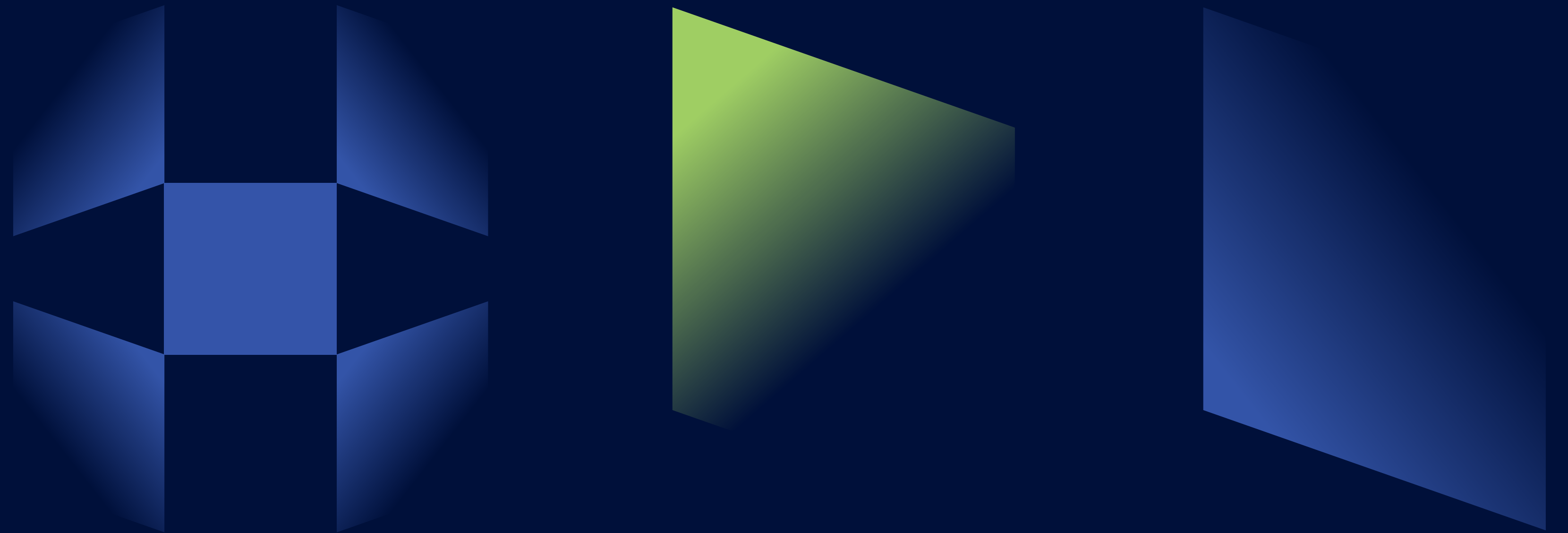
+ #FFFFFF 10% opacity pattern



Graphic Elements

The graphic elements used in the design are inspired by the shape and it's wings separately. These elements serve as accents in illustrations and collages, adding visual interest and reinforcing brand identity. Additionally, they are utilized as background elements to create depth and cohesion across various design materials.

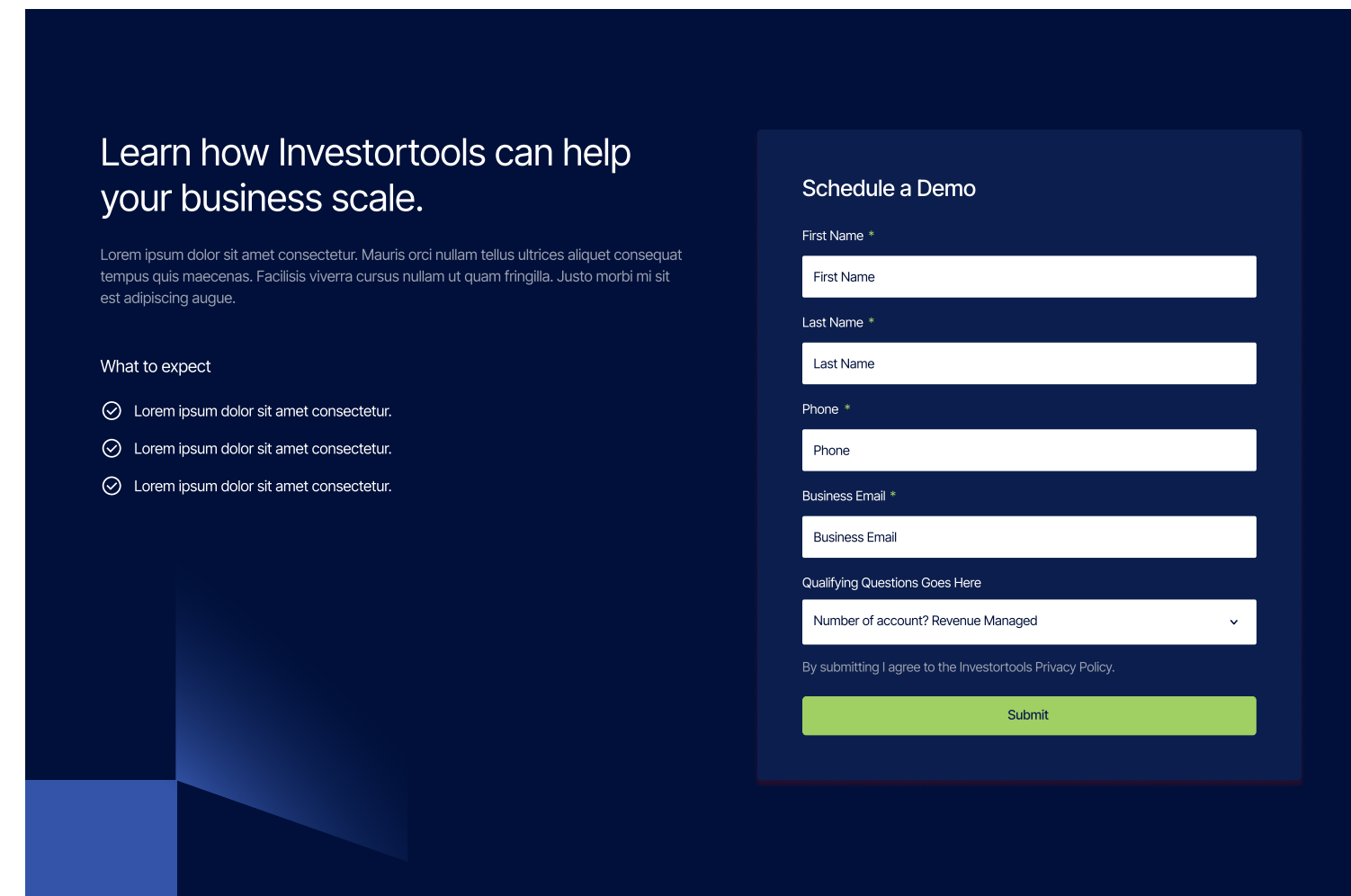
Sapphire gradient shapes should be used on dark backgrounds only, while Lime can be used on both dark and light backgrounds, but should be avoided over other brand colors.



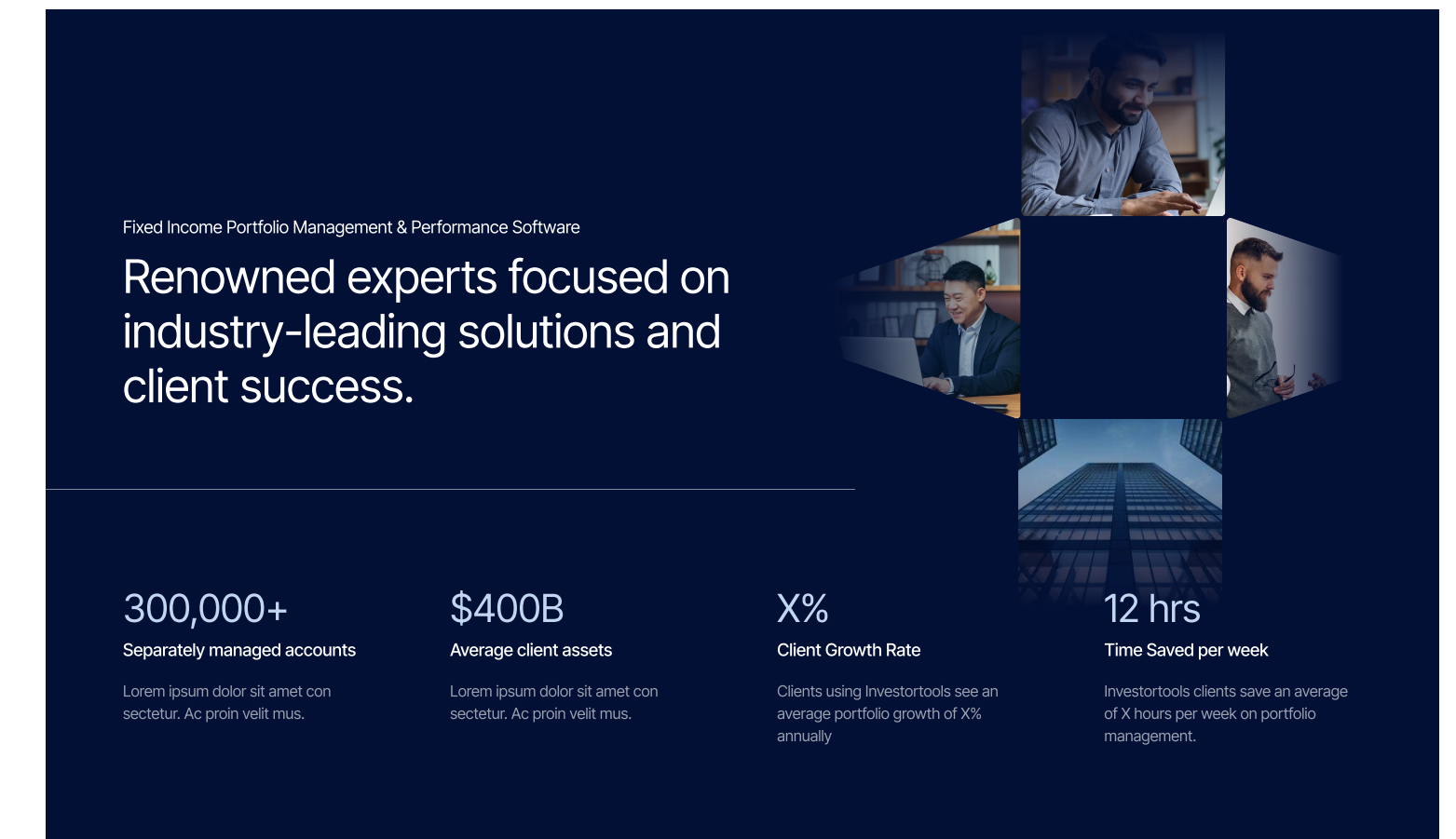
Logomark Shape Usage Examples



In illustration

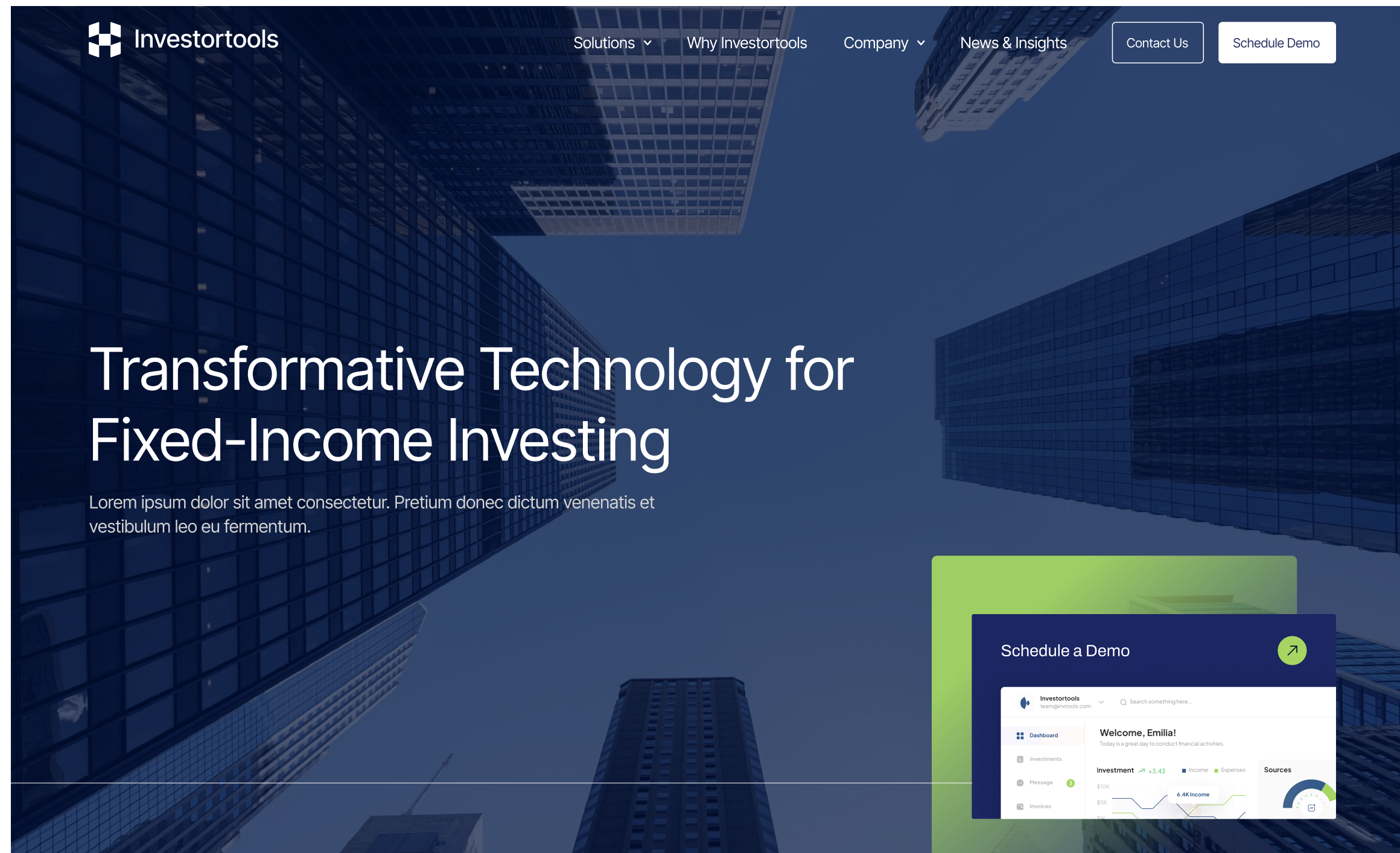


As a background element

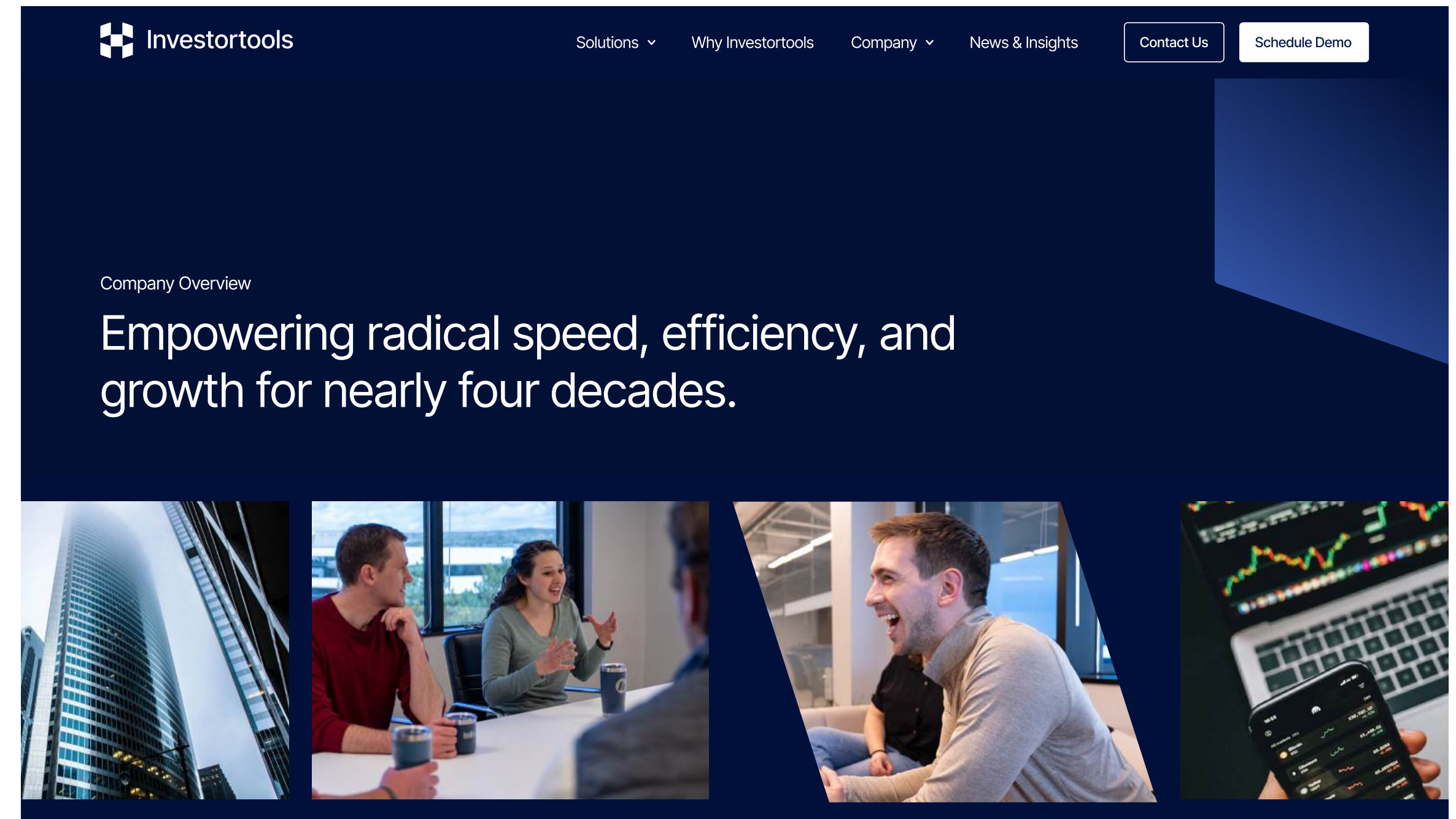


As an inverted photo mask

Wing Shape Usage Examples



As a part of collage



As a background color accent

Purpose

The product graphics highlight key features of the product in a simplified and visually engaging manner. These graphics can be mixed with photos in collages to enhance the visual narrative.

Highlighting Key Features

Focus on the most critical aspects of the product, such as financial metrics, market data, and performance indicators, to provide a clear and impactful summary. Use stylized UI graphics or icons in the same style.

Style

Maintain a clean, minimalist design with a focus on clarity and readability. Use simple shapes, straight lines and small chunks of text/data.

Make sure that subject matter is presented in an abstract manner without accentuating the specific numbers or metrics.

Shadows

Make sure each graphic has a #021036 drop shadow with 25% opacity, 4 Y shift, 8 spread and 14 blur.

Color Scheme

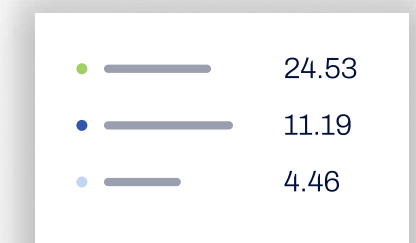
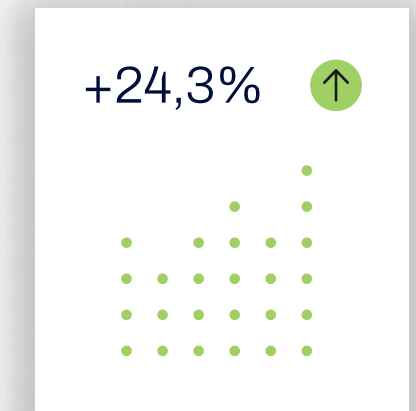
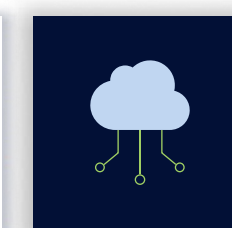
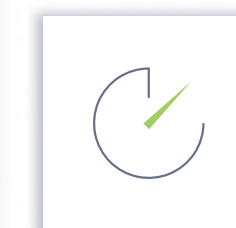
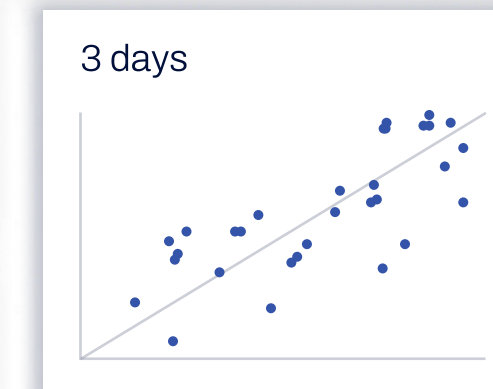
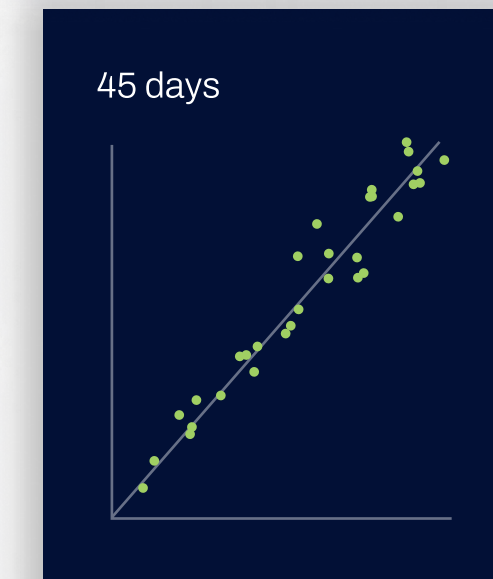
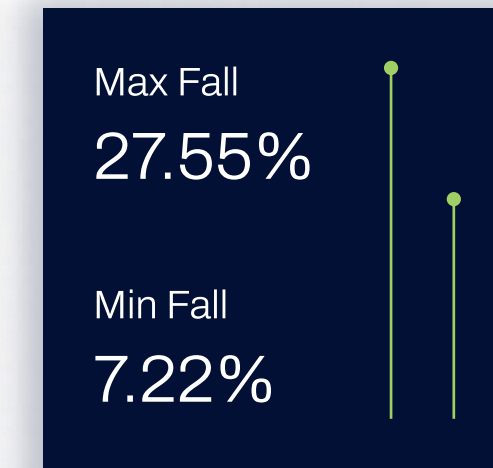
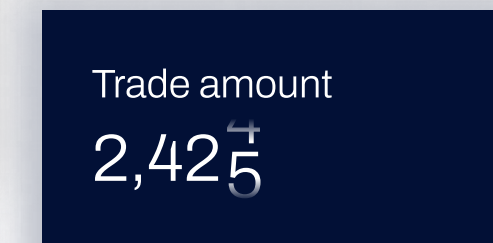
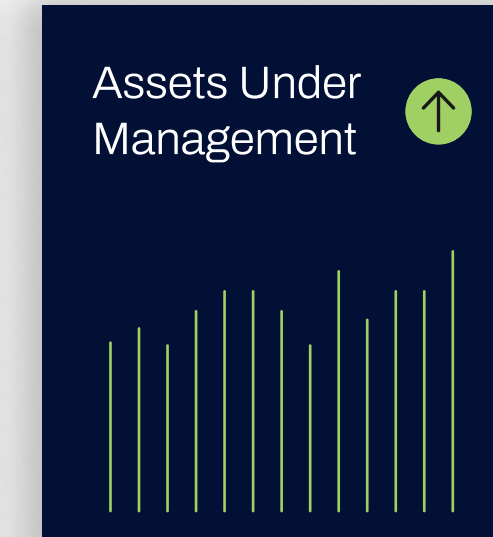
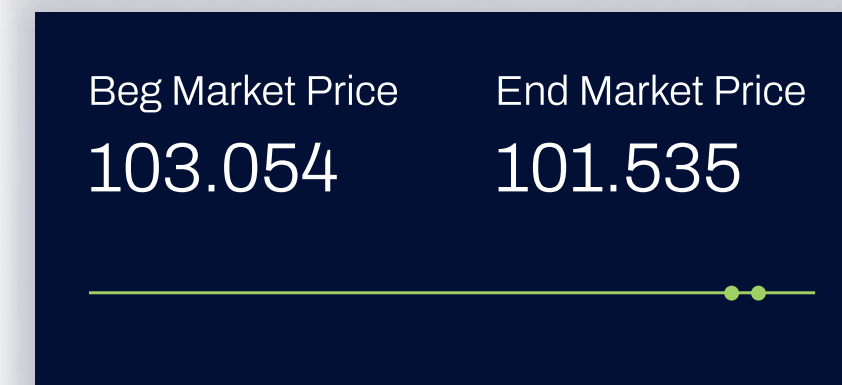
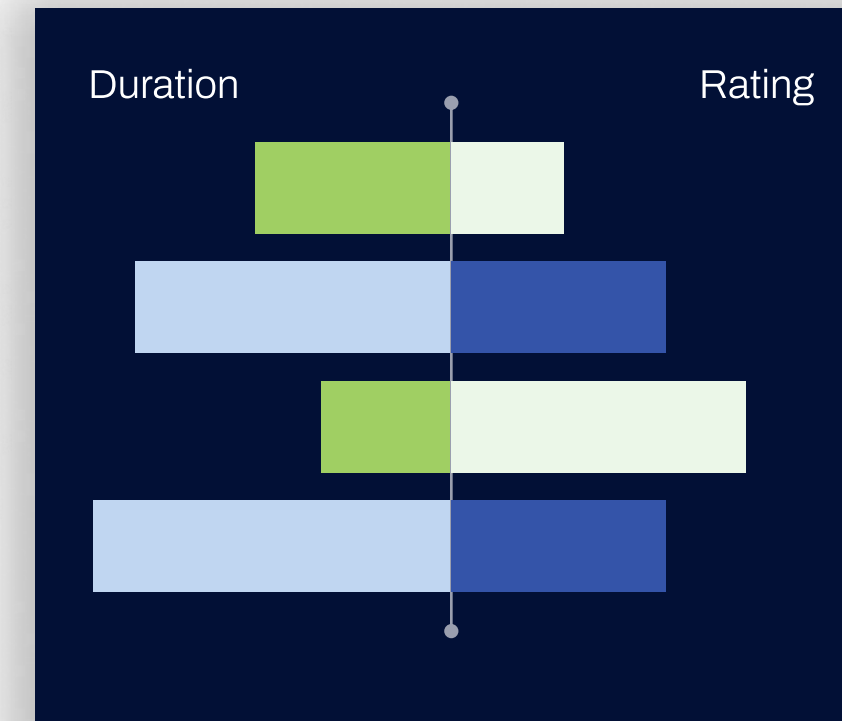
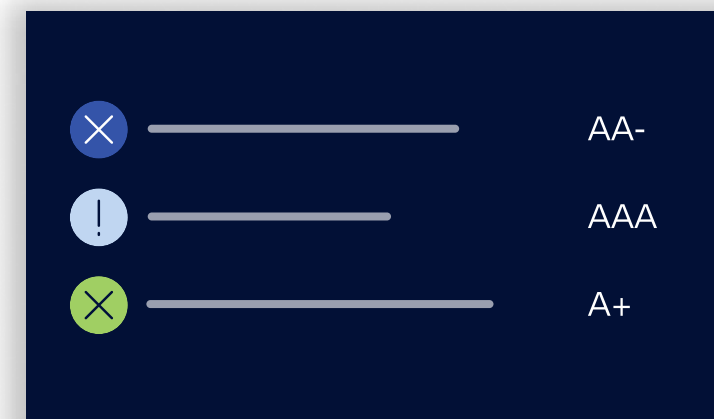
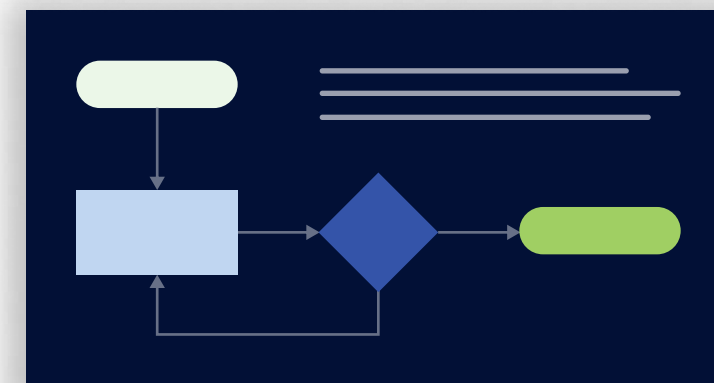
Focus on Blue Black or White for the backgrounds and Lime, Arctic blue and Sapphire for the accents.

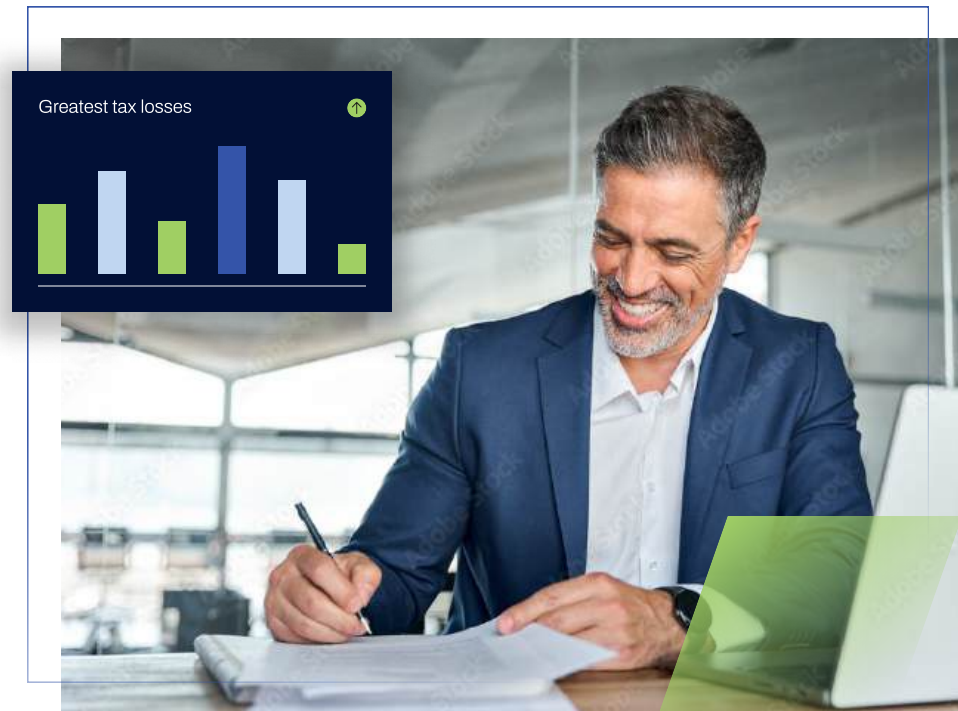
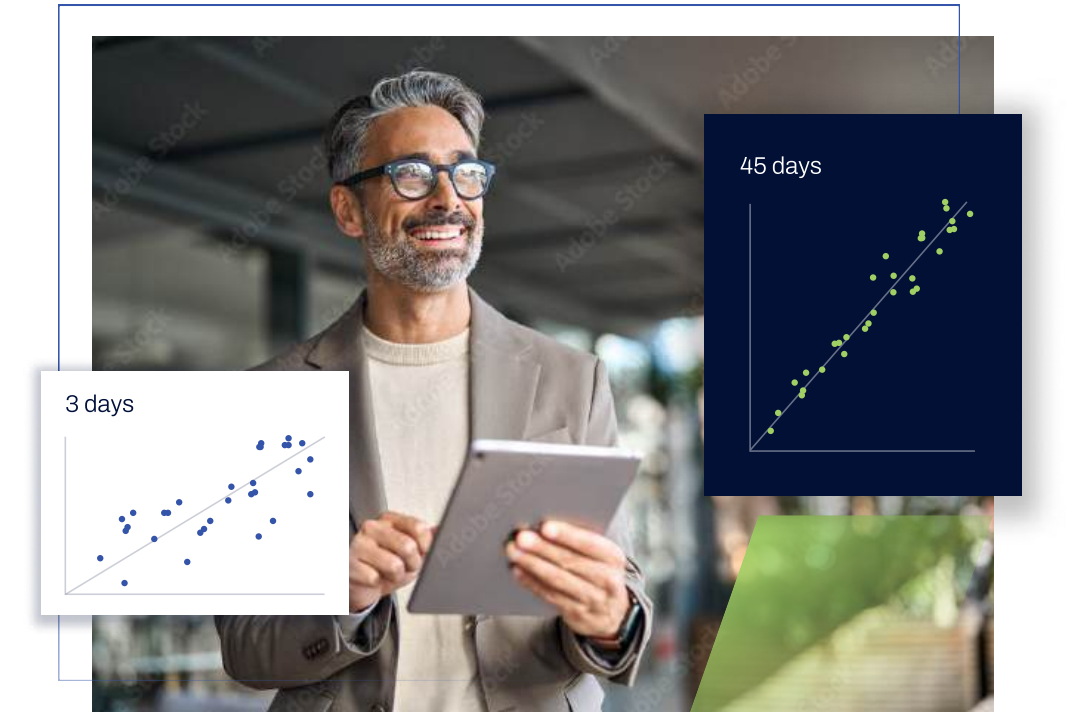
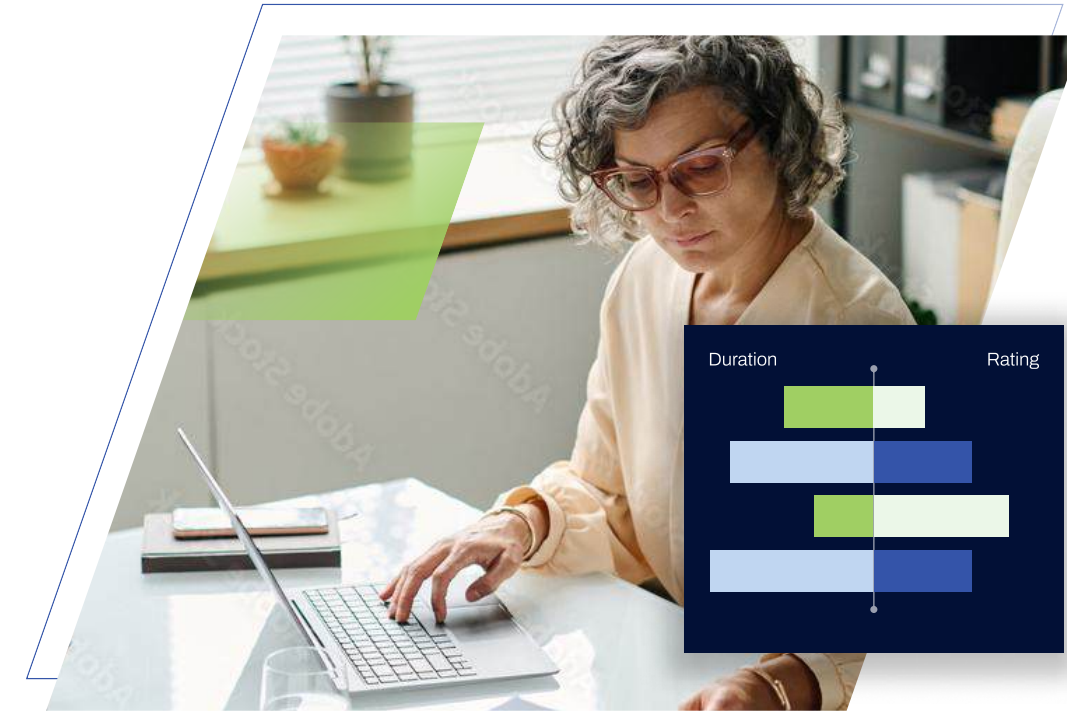
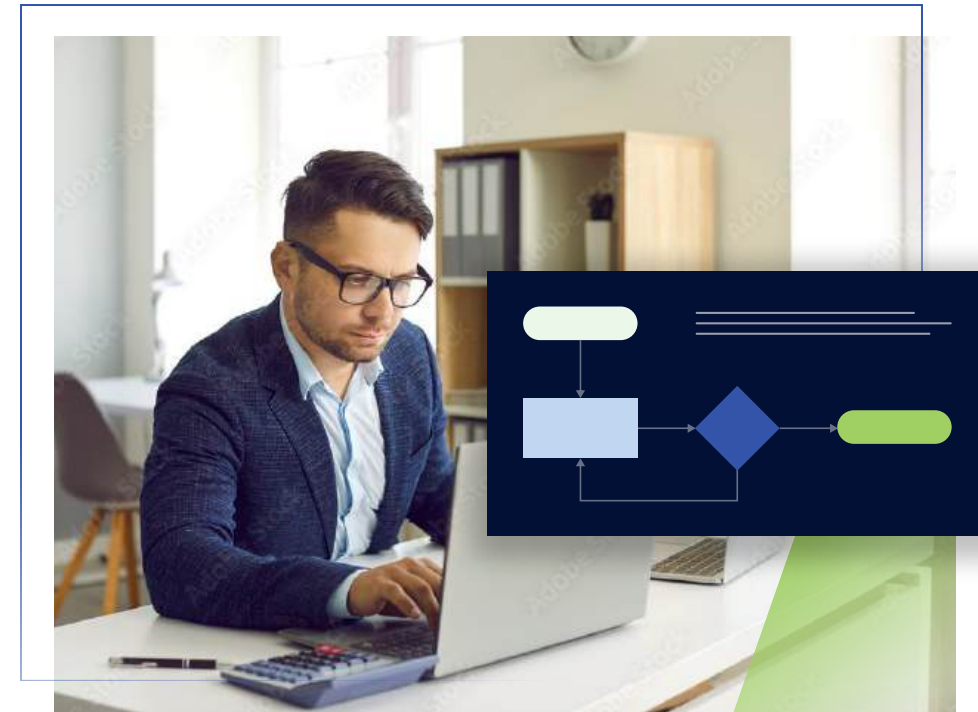
Weights and strokes

Each stroke used in the graphics should be 1 px. The abstract lines representing text can vary from 2 to 3 px in height depending on the graphic size.

Spacing and Alignment

Maintain adequate spacing around each graphic to avoid clutter and ensure a balanced composition. Avoid overpapping. Ensure that the graphics complement the photos and do not overwhelm or obscure important visual elements, especially faces.





Rounded Corners

All design elements, including blocks, callouts, product graphics, photos, tiles, and patterns, should have 0 pt corner roundings to maintain a sharp and cohesive visual style. This rule applies to all components to ensure consistency across the design.

There are two exceptions to this guideline: the logo, which has fixed corner roundings, and buttons and input fields, which feature 4 pt corner roundings.

Buttons 4 pt

<p>Primary</p>	<p>Hover</p>
<p>Secondary</p>	
<p>Tertiary</p>	

Other design elements 0 pt

"We take pride in being the most innovative investment software company. Every Friday we have a all hands brainstorm session to throw new ideas at the wall. I love it!"

Name Here, Title | Investortools

\$150,000 ↑

News & Events 01.17.24

Upcoming Webinar: Automate your Workflow. Make the move to Low-Touch Trading



















Sub-branding for products is based on using one brand color as the primary color accent in the design. This color is applied to the logo mark, icons, buttons, and smaller graphics, creating a cohesive and recognizable visual identity for each product.

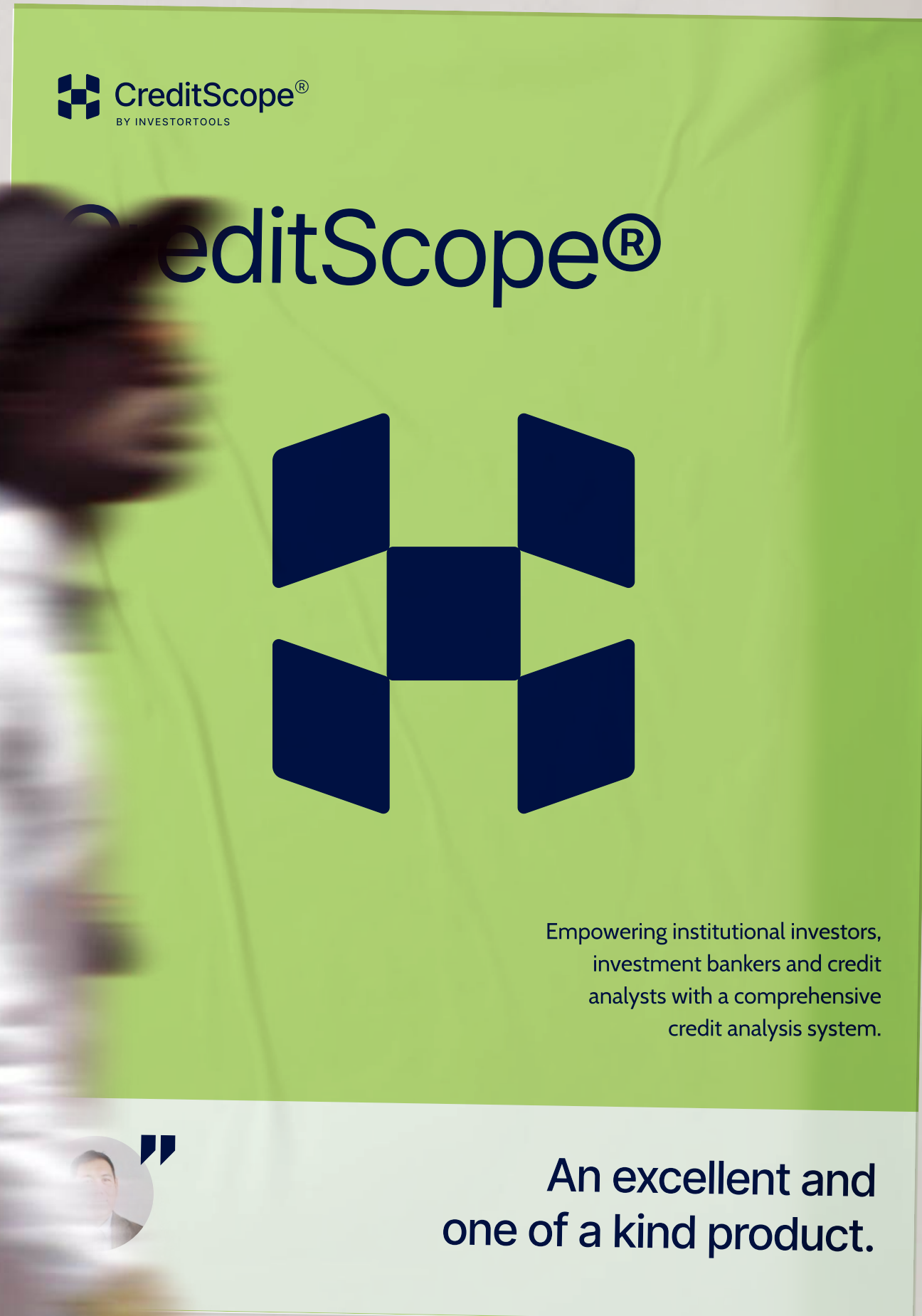
The accent color should not be used for text and should be used cautiously for backgrounds. Best practice is to avoid colored backgrounds in web or UI design, though they can be utilized in print or social media graphics. When using colored backgrounds, ensure they are not paired with colored graphics or text. Instead, combine them with White or Blue Black content to maintain accessibility and visual clarity.

Primary product colors

Sapphire #3455A9	Lime #A0CF64	Terra #CA5A1A
----------------------------	------------------------	-------------------------


Extended palette for future products

Slate #32495E RGB: 50, 73, 94	Ocean #24678c RGB: 36, 103, 140	Fog #96a8ae RGB: 150, 168, 174	Olive #455e45 RGB: 47, 126, 60	Plum #382143 RGB: 80, 58, 117	Mint #C9D3A1 RGB: 202, 215, 147	Ash #A4A7B5 RGB: 164, 167, 181	Gold #9F8969 RGB: 159, 137, 105	Charcoal #515151 RGB: 81, 81, 81
 Slate #32495E	 Ocean #24678c	 Fog #96a8ae	 Olive #455e45	 Plum #382143	 Mint #CAD793	 Ash #A4A7B5	 Gold #9F8969	 Charcoal #515151
 Slate #32495E	 Ocean #24678c	 Fog #96a8ae	 Olive #455e45	 Plum #382143	 Mint #CAD793	 Ash #A4A7B5	 Gold #9F8969	 Charcoal #515151




CreditScope®
BY INVESTORTOOLS

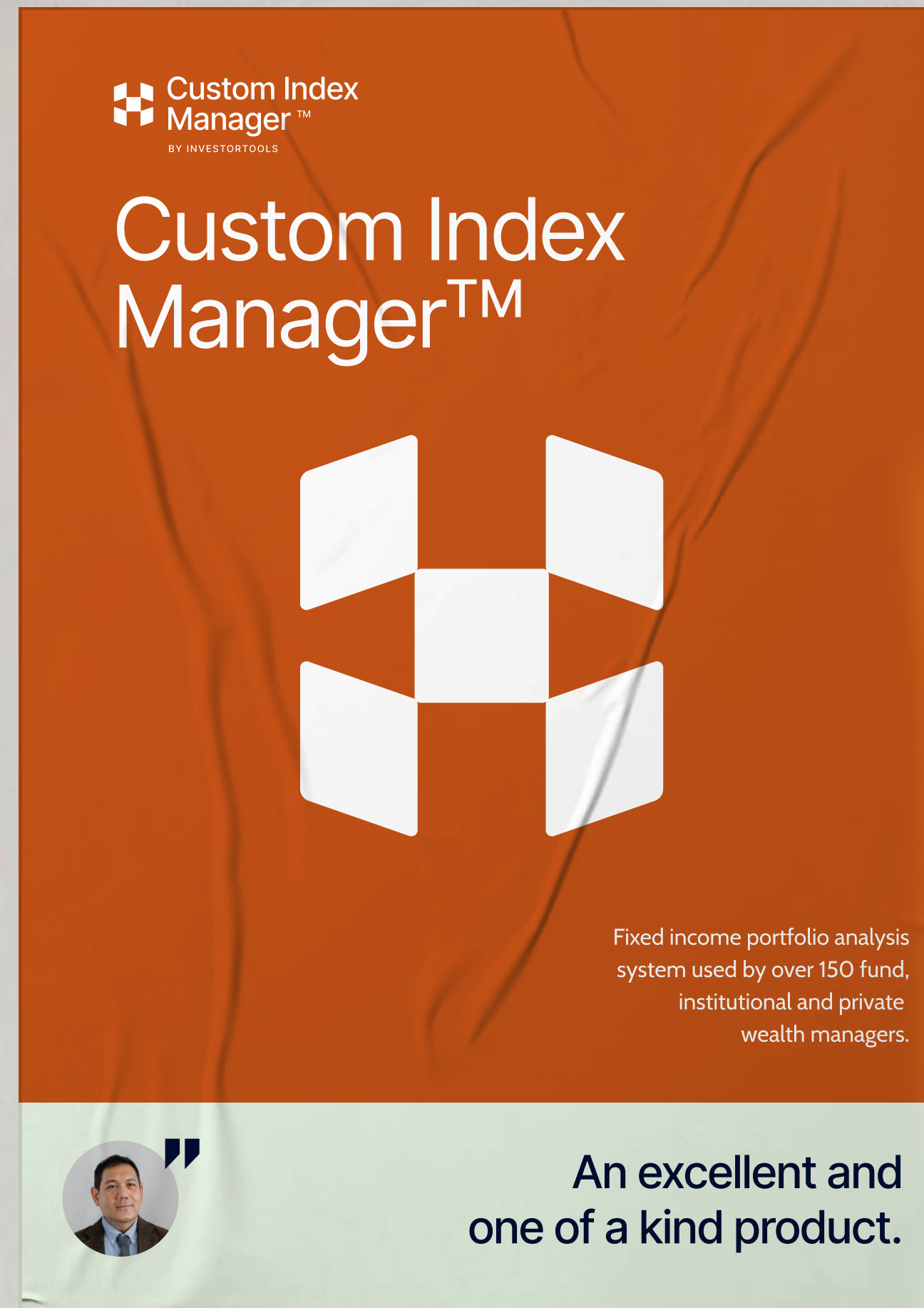
CreditScope®



Empowering institutional investors, investment bankers and credit analysts with a comprehensive credit analysis system.




An excellent and one of a kind product.




Custom Index Manager™
BY INVESTORTOOLS

Custom Index Manager™



Fixed income portfolio analysis system used by over 150 fund, institutional and private wealth managers.



An excellent and one of a kind product.



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An excellent and one of a kind product.

Envision Clarity, Spotlight Outliers.

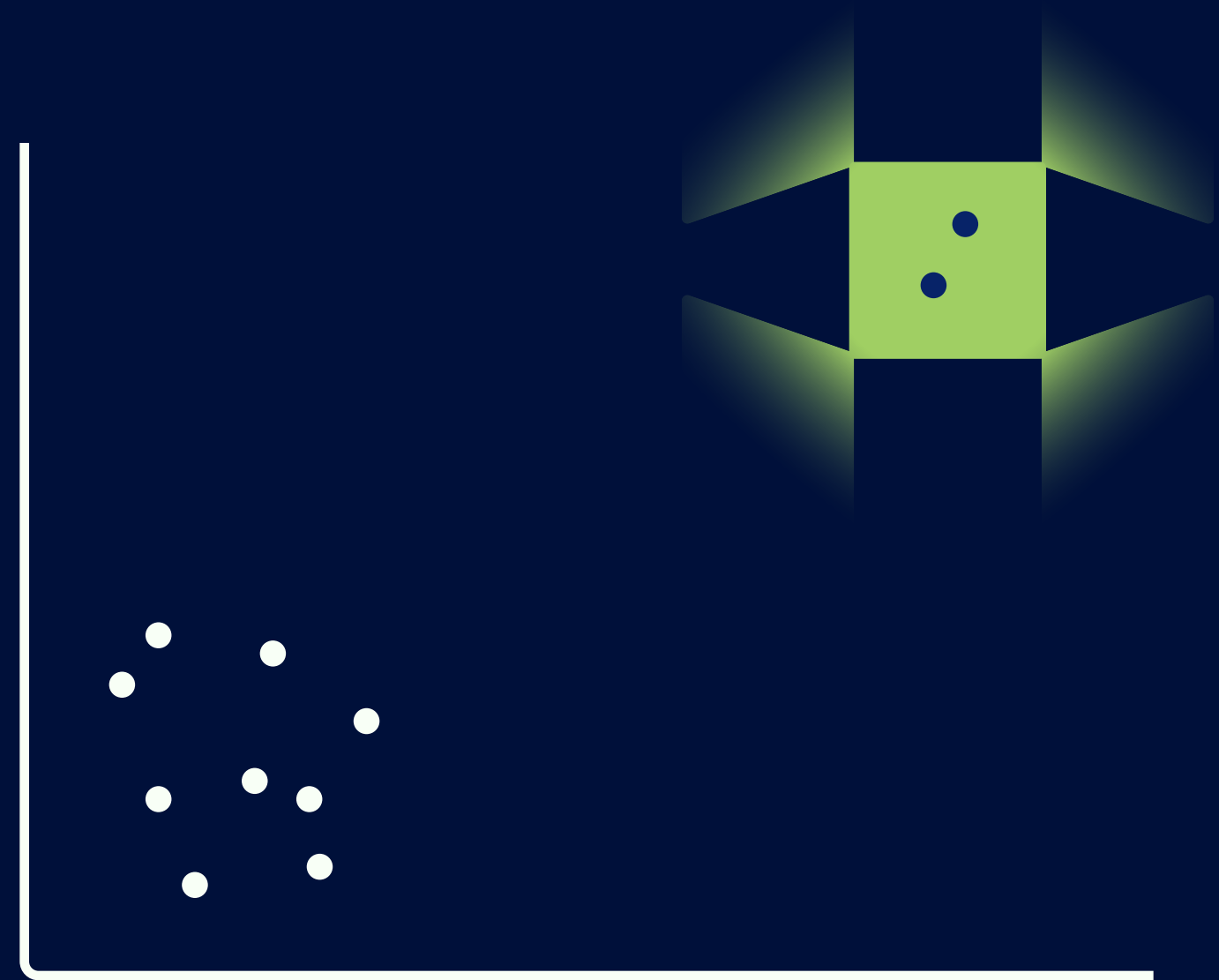


Sapphire

#3455A9



Envision Clarity, Spotlight Outliers.

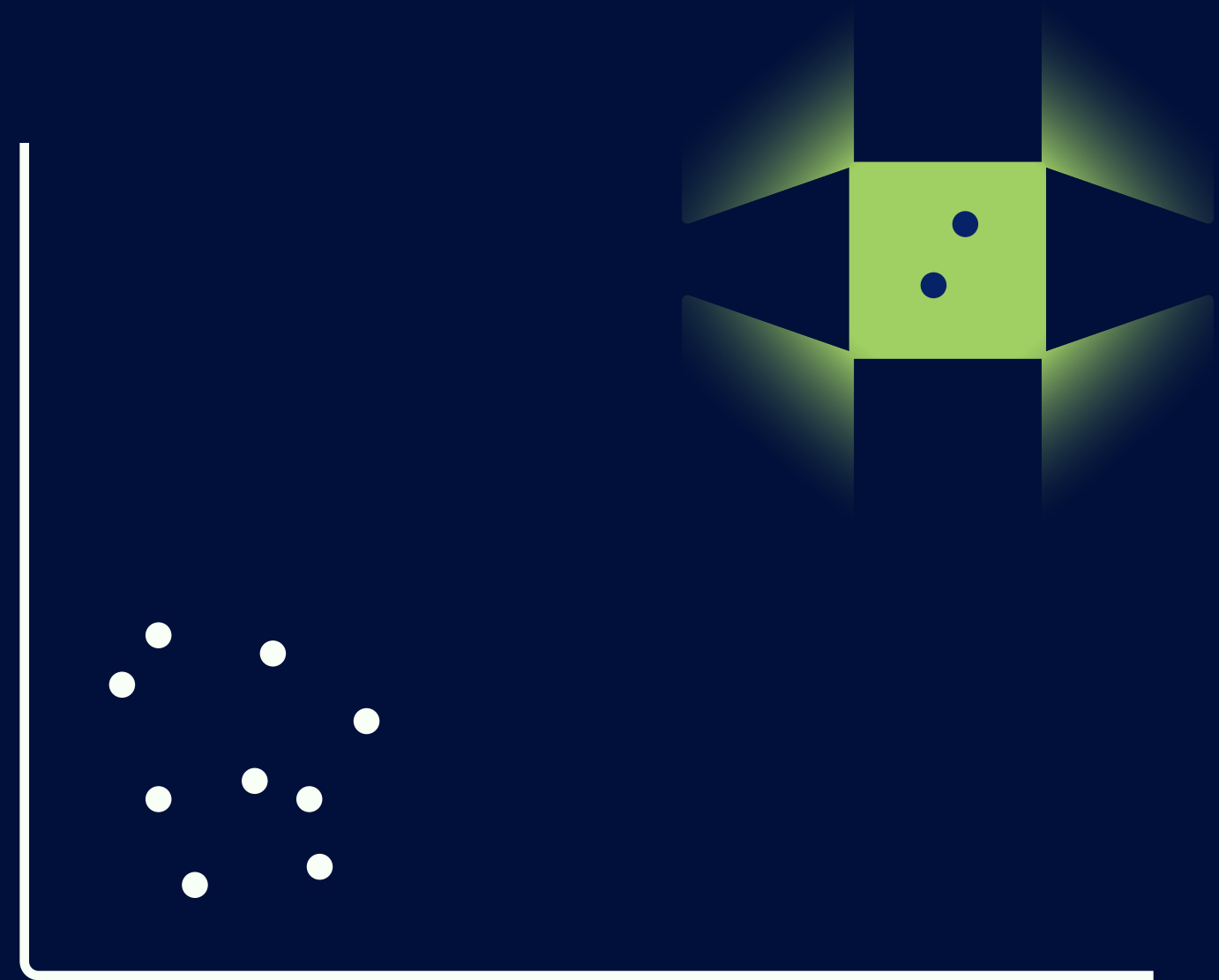


 Custom Index
Manager™
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Terra
#CA5A1A



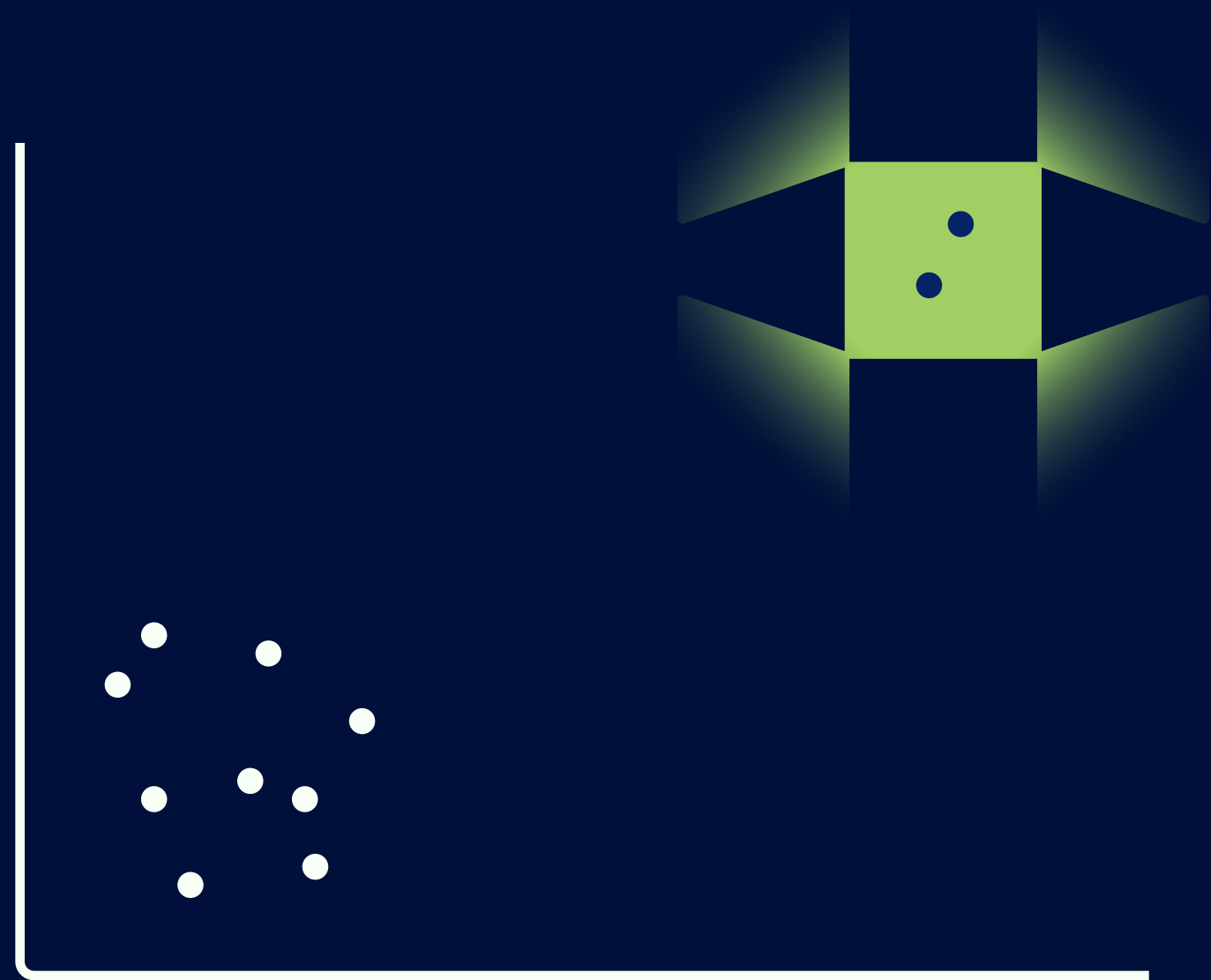
Envision Clarity, Spotlight Outliers.



Lime
#A0CF64



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Fog
#96a8ae

