



Finalist Best Multi-Asset Portfolios

By Lumenai Investments LLC, September 2025

Lumenai Investments is nominated for Best Multi-Asset Portfolios for the 2025 CIO Industry Innovation Awards, following its win in the category in 2024

STAMFORD, CT, Sep 1, 2025—In recognition of its AI-driven GO Quality and GO Dividends multi-asset portfolios, Lumenai Investments, a quantitative and AI-based investing and reporting subadvisor, is nominated for Best Multi-Asset Portfolios for the 2025 CIO Industry Innovation Awards. Winners will be announced at a celebration at Chelsea Piers in New York City on October 16, 2025. In 2024, Lumenai was chosen as the winner in the same category.

Nominated “firms are being recognized for thriving and being leaders in the institutional investing market,” says CIO. The awards process began in February with the collection of nominations from select investment industry participants. Then, based on the nominees’ performance, innovative strategies, contributions to the industry and drivers of success, an internal panel at CIO chose the finalists and will select the winners in the Asset Management & Service Providers Award category, including those nominated for Best Multi-Asset Portfolios. Lumenai is a Stamford, CT-based and AI-driven quantitative investment manager focused on building alpha-seeking, adaptive portfolios for wealth

managers, family offices, and institutional clients. It is among the first in the U.S. to offer institutional-grade AI portfolio management tailored to client goals across multi-asset, equity, and market-neutral strategies.

GO Quality and GO Dividends are AI-driven multi-asset portfolios designed to generate alpha and outperform their benchmarks while taking similar risk. GO Quality emphasizes stocks with strong balance sheets, high profitability, and stable earnings, while GO Dividends focuses on providing income by investing in quality stocks with strong dividend yields.

“Since last year’s win, we’ve continued striving to be at the cutting edge of applying AI-driven quantitative methods to help clients invest smarter. We’re continually working to refine our services and adopt new innovations, such as tokenizing our portfolios. It’s very meaningful to us to once again have the quality and innovativeness of our multi-asset portfolios recognized by the industry,” said John Bailey, Founder and CEO of Lumenai Investments.

About Lumenai

Lumenai is an outsourced and AI-powered quantitative investing and reporting manager that wants to make active investing effortless for financial professionals. Its investment process is powered by ETS Asset Management Factory, a research and advisory firm that has specialized in quantitative and AI investing since 1987. Learn more at www.lumenai.net

About Chief Investment Officer - CIO

Chief Investment Officer is an independent source for context and insight to institutional chief investment officers (and other key investment decision-makers) around the world about the vital components of institutional asset ownership and management that matter most to them: asset allocation, portfolio construction, manager selection, risk management, governance and stewardship. Our mission is to maintain a community for dialogue among these investors through

reporting about newsmakers; publishing news, insights, opinions and expertise from fellow asset owners and other institutional investing experts; and hosting in-person discussion forums and awards programs that build community and recognize excellence. We also focus on the topics of team building and leadership, which are vital to a chief investment officer’s success.

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