

Access a Growing Lineup of Alternative Investments

Coming Soon

We're expanding access to alternative investments through a new platform partnership with **CAIS**, a leading platform for alternative investments to bring you a broader universe of alternative investments. This addition complements existing alternative investment offerings at Axos and gives advisors more ways to explore strategies, research funds, and build alternatives into client portfolios.

The Value of Alternatives

A different kind of investment



Alternatives include strategies such as private equity, private credit, hedge funds, and real estate. These investments fall outside stocks and bonds and often have different return drivers, time horizons, and risk profiles.

Diversify beyond stocks and bonds



Advisors are using alternatives to access private market growth and pursue return and income opportunities beyond what public markets alone can offer.



The CAIS Platform Partnership

A significant expansion of the alternative investments available to your firm, with a digital experience built to help you research, evaluate, and access alternatives with greater efficiency. We'll share details on availability and how to get started soon.

Strategy types

Private equity, private credit, hedge funds, and more

Eligible accounts

Expanded availability, including taxable accounts

Research-supported

Fund-level due diligence materials at your fingertips

Education

Interactive CAIS IQ courses to deepen alts expertise



Questions? Please reach out to your Client Service Advocate.

For Institutional Use Only. **Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

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