NEWS

For Immediate Release

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BX Partners Launches Risk-Aware Bitcoin Model for Financial Advisors

New rules-based solution combines complementary investment strategies to help advisors provide disciplined Bitcoin exposure while managing volatility

Charlotte, NC (September 15, 2026) – BX Partners, a research-driven investment consulting platform serving chief investment officers (CIOs), financial advisors, registered investment advisers (RIAs), and broker-dealers, today announced the launch of the BX Risk-Aware Bitcoin Model, a rules-based investment solution designed to help financial advisors incorporate Bitcoin into client portfolios through a disciplined, systematic investment process. Available through the BX Index platform, the model combines two independent investment methodologies from Dynalogic and phaseinvest to help advisors pursue Bitcoin's growth potential while seeking to reduce volatility and downside risk.

As interest in digital assets continues to grow, many financial advisors face a difficult challenge: how to address client demand for Bitcoin without exposing portfolios to the asset's historically significant volatility. Rather than relying on traditional buy-and-hold approaches or discretionary market timing, the BX Risk-Aware Bitcoin Model applies two complementary, rules-based strategies that systematically respond to changing market conditions.

"The BX Risk-Aware Bitcoin Model solves a real problem advisors face every day," said Christopher McHeffey, co-founder of BX Partners. "Their clients are asking about Bitcoin, but there hasn't been a satisfying answer between 'just don't' and 'put it all in a spot ETF and hold on.' This

model gives advisors a third option: structured, transparent, and built around managing risk rather than hoping it goes up."

"What makes this model different is that it's not trying to predict Bitcoin," added Craig Cmiel, director at BX Partners. "It's designed to respond to it systematically, without emotion. The Dynalogic component sells into strength and buys into weakness by design. The phaseinvest PDE layer catches regime shifts early. Together they do what most investors struggle to do on their own."

TWO INEPENDENT STRATEGIES. ONE DISCIPLINED INVESTMENT FRAMEWORK.

The BX Risk-Aware Bitcoin Model combines two complementary methodologies that respond to different market signals.

The **Dynalogic strategy** uses the iShares Bitcoin Trust (IBIT). It follows a tiered, price-contingent process, taking profits as Bitcoin climbs and redeploying capital at larger sizes as it falls, embedding a natural sell-high, buy-low discipline without relying on human judgment.

"Advisors don't need a reason to be interested in Bitcoin," stated Bill Flowers, founder and managing director of Dynalogic. "Their clients are already asking. What they need is a framework they can stand behind in a client meeting, something they can explain, something with a clear process, and something that doesn't make them look reckless. That's exactly what the BX Risk-Aware Bitcoin Model provides."

The **phaseinvest Phase Detection Engine (PDE),** developed originally for equities, identifies structural breaks in Bitcoin's volatility to determine the current market regime, then measures momentum only within that phase. When momentum is positive, the strategy holds maximum exposure. When it turns negative, it steps back and allocates to short-duration Treasuries until conditions improve.

"We built the PDE strategy because traditional momentum models have a fundamental flaw – they measure price across different market regimes, so they're always a step behind at exactly the wrong moment," said Arun Soni, CEO of phaseinvest. "By isolating momentum within its current regime, the PDE responds faster, protects capital more effectively in downturns, and gets back in sooner when conditions improve."

DESIGNED TO IMPROVE RISK-ADJUSTED OUTCOMES

In backtested results covering June 2021 through June 2026, the blended BX Risk-Aware Bitcoin Model generated a total return of 160.3%, compared with 89.3% for a traditional buy-and-hold Bitcoin strategy. During the same period, the model produced 35% lower annualized volatility while reducing maximum drawdown by 17 percentage points. All performance figures are hypothetical and based on back-tested results.

With the BX Risk-Aware Bitcoin Model, advisors can bring a disciplined, transparent Bitcoin strategy to client conversations with a documented process, a clear risk management framework, and a track record they can point to. Access is available immediately at https://bxindex.com/bitcoin-model/. The BX Bitcoin strategy is also available on the UX Wealth platform.

ABOUT BX PARTNERS

BX Partners is a research-driven investment consulting platform that supports financial professionals in building institutional-quality models with the goal of enhancing existing internal asset management platforms. BX combines quantitative, rules-based, and AI-enabled methodologies to curate high-conviction strategies designed to outperform across market cycles. The BX team conducts rigorous due diligence on many strategies each year, selecting only the ones that have the strongest potential to deliver risk-adjusted returns. The company has so far selected 25 leading research firms and 65 strategies to be included in the platform. BX is not a money manager. BX operates as a strategy engine, research partner, and open architecture solution. The BX technology suite includes the BX Advisor App, BX Risk Shield, and BX Core, giving financial professionals real-time analytics, market insights, and financial planning tools. BX Partners delivers the power behind the industry's most innovative investment departments. To learn more about BX Partners, visit www.BXIndex.com.

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