NEWS

For Immediate Release

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YCharts Makes Inc. 5000 List 10th Consecutive Year

Company also lands a Wealthies nod, heads to Future Proof to put agentic AI tool 'Y' on display

CHICAGO — [September 1st]—YCharts, a leading investment research and client engagement platform trusted by thousands of financial professionals across North America, has been named to the Inc. 5000 list of America's fastest-growing private companies for the 10th consecutive year. The recognition caps a period of steady expansion for the company, which has also been named a 2026 *Wealth Management* "Wealthies" Award finalist and is set to speak at and attend the Future Proof Festival in Huntington Beach this month.

INC. 5000 WINNER FOR TEN CONSECUTIVE YEARS

Inc. 5000 ranks private U.S. companies by revenue growth over a three-year period, drawing from tens of thousands of applicants each year. A decade of consecutive inclusion places YCharts among a small group of companies that have sustained high growth rates over that span, according to Inc.'s methodology.

"Earning the Inc 5000 award for 10 consecutive years isn't something we take for granted," said Sean Brown, President and CEO of YCharts. "It reflects our team's hard work and the trust our clients have placed in our platform, year after year. We built this business on solving real problems for financial professionals, and we remain committed to finding new ways to help them better serve their clients."

WEALTH MANAGEMENT INDUSTRY AWARD FINALISTS

The Inc. 5000 recognition arrives alongside a finalist nod in the Wealth Management Industry Awards. The company was named a finalist in the Portfolio Analytics category for its Individual Bond Data offering. Executives from YCharts will be in the audience at the 2026 "Wealthies" Awards dinner and corresponding afternoon executive summit being held this month in Manhattan, where the winners in each category will

be revealed.

Bond Data expands YCharts' multi-asset coverage, addressing a blind spot in fixed-income analysis and was developed in response to advisors' demand for deeper, bond-level data. By introducing bond-level transparency to portfolio analysis, YCharts enables wealth professionals to deliver more accurate and actionable fixed-income insights.

YCHARTS' NEWEST FEATURES ON DISPLAY AT FUTURE PROOF FESTIVAL

YCharts is also slated to have a big presence at the Future Proof Festival, one of the industry's largest events, where the company will connect with advisors and asset managers in Huntington Beach, CA. Attendees will be able to see "Y," YCharts' new agentic AI tool, in action at the YCharts booth, where staff will walk through how the agent executes proposal generation, portfolio construction, and client communication workflows from plain-language prompts.

YCharts will also host a speaking session "Visual Storytelling: The Psychology of Persuasion in Client Meetings," led by Chief Revenue Officer John Vander Vennet. The session will examine how leading firms use visual storytelling to simplify complex investment concepts, frame risk, and help clients make more confident investment decisions.

ABOUT YCHARTS

YCharts is a top-ranked investment research and client engagement platform that enables financial advisors and asset managers to make smarter investment decisions and better communicate with clients. Trusted by over 15,000 financial professionals and recognized as the Investment Research market leader by Kitces research, YCharts delivers intuitive tools for security research, portfolio construction, AI-enabled proposals, client communication, and market monitoring. Learn more at www.YCharts.com.

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