



THE MOORINGS GROUP
Custom fixed income portfolio management

Quick Facts about The Moorings Group

1. Founded in 2003
2. Independent Investment Advisor registered with the SEC*
3. Wholly owned by the firm's investment professionals
4. Total of over 75 years of experience in fixed income markets
5. Approximately 175 clients served
6. Over 240 portfolios managed
7. Assets under management: approximately \$478mm**
8. Supporter of community charities
9. Firm-wide GIPS Verification since 2004

*registration does not imply a certain level of skill or training

**as of 12/31/23