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**FolioDynamix, Innovator of Cross Asset and Multi-Currency Managed Accounts Platform,  
Acquires SunGard Advisory Technologies Inc.**

**Immediate Deal Deliverable: An Unbundled Turnkey Asset Management Program**

NEW YORK, NY - August 11, 2008 – Privately held FolioDynamix, a driver of innovation in unified managed accounts technology and services, today announced its acquisition of SunGard Advisory Technologies Inc. (SAT), a provider of investment management programs and wealth management platform solutions to financial services organizations nationwide. Terms of the transaction were not disclosed. Clients of FolioDynamix encompass top wealth management businesses including major brokerage firms, registered investment advisors, asset management firms and banks.

An established presence in the managed accounts industry, which is projected to reach \$2.7 trillion in assets by 2010 according to Cerulli Associates, FolioDynamix processes over 3.5 million accounts daily and supports in excess of 12,000 advisors who leverage the firm's FDx platform to oversee a variety of fee-based programs including Unified Managed Accounts (UMA), Unified Managed Households (UMH), Separately Managed Accounts (SMA), Mutual Fund Advisory (MFA) and Rep-As-Manager. A cross asset and multi-currency platform, FDx enables users to trade equities, fixed income, ETFs, mutual funds, options and other alternative assets with long or short positions, in a discretionary or non-discretionary manner. The FDx scalable technology and services infrastructure function as both a bundled and unbundled offering, supporting all phases of a firm's business evolution.

"Adding SAT's deep services to the technically robust FDx platform creates a new paradigm in the managed accounts business," said FolioDynamix President & CEO, Joseph Mrak. "This acquisition's success brings together the best visionary leaders and expertise in unified managed accounts. We can be everything from a turnkey asset management program (TAMP) to a pure technology sale and everything in between." SAT will be renamed FDx Advisors.

"The industry craves a service offering providing capabilities of a TAMP but without the associated costs and lack of flexibility," said Mrak. "FDx and FDx Advisors achieve this mission through integration with a client's back-office environment, paving the way for an expansion of capabilities in their wealth management practice. We are excited about the acquisition for many reasons; chief among them is realization of our unbundled TAMP vision, as well as the opportunity to add more discretionary solutions such as full overlay management services."

“We believe that SAT will be able to best capitalize on current trends in the wealth management industry as part of FolioDynamix. SunGard will maintain a strong relationship with FDx Advisors and moving forward our customers will be able to utilize FDx Advisors’ discretionary services in conjunction with their SunGard solutions,” said Kevin Rafferty, president of SunGard’s wealth management business.

FDx and FDx Advisors are geared to a wide swath of businesses from start-ups to established players. The FDx TAMP is designed to accelerate a firm’s growth plans, and provides an immediate “to market” solution for early stage firms. Mature businesses are drawn to the TAMP’s flexibility and efficiencies, while firms launching a new product look to the platform’s technology to assist them in creating competitive differentiation and driving new asset growth quickly and cost-effectively.

### **About FolioDynamix**

Privately held and based in New York since inception in 1999, FolioDynamix is an established leader in the fast growing managed account industry. Its FDx platform is a configurable, thin-client application with tools to manage a portfolio through the lifecycle of an account, including a fully proprietary tax lot and cost accounting engine, new account opening tools, model management, multi-account trading, rebalancing, fee billing, management reporting and performance reporting. FolioDynamix also offers supplementary business services to complement the FDx technology platform, including a comprehensive database of leading money managers, mutual funds and ETFs. For more information on FolioDynamix, please visit [www.foliodynamix.com](http://www.foliodynamix.com).

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