



F/m Investments Announces Product Updates for F/m Opportunistic Income ETF *Ticker Change to ZHOG and Portfolio Management Updates Effective January 1, 2026*

WASHINGTON, D.C. – December 29, 2025 – [F/m Investments](#) (“F/m”), an \$18 billion investment firm and innovative provider of exchange-traded funds (ETFs), today announced a series of product updates to the **F/m Opportunistic Income ETF**.

Effective **January 1, 2026**, the Fund will undergo the following changes:

Ticker Symbol Update

The Fund’s ticker symbol will change from **XFIX** to **ZHOG**. The Fund’s CUSIP will remain unchanged.

Benchmark Index Update

The Fund will adopt the **Bloomberg Short-Term U.S. Aggregate Index (Ticker: I34355US)** as its benchmark for performance comparison purposes. The Fund will remain actively managed and will not seek to track or replicate the benchmark index.

Portfolio Management Team Changes

F/m Investments is also announcing updates to the Fund’s portfolio management team:

Added to the Portfolio Management Team

- Barry Julien, CFA – Senior Portfolio Manager
- John Han, CFA, CPA – Portfolio Manager
- Kevin Conrath – Portfolio Manager

Removed from the Portfolio Management Team

- Marcin Zdunek – Portfolio Manager
- Justin Hennessy – Senior Portfolio Manager

About F/m Investments

F/m Investments, founded in 2018, is an independent asset management firm and a recognized innovator in exchange-traded funds (ETFs). The Firm offers a growing suite of ETFs, as well as mutual funds and separately managed account strategies, designed to meet the evolving needs of financial advisors, institutions, and individual investors. For more information, please visit www.fminvest.com.

Investors should consider the investment objectives, risks, charges, and expenses before investing. For a prospectus or summary prospectus with this and other information about the Fund, please call 1-800-617-0004 or visit our website at www.fminvest.com. Read the prospectus or summary prospectus carefully before investing.

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As with all ETFs, Shares may be bought and sold in the secondary market at market prices. Interest rate risk is the risk of losses attributable to changes in interest rates. In general, if prevailing interest rates rise, the values of debt instruments tend to fall, and if interest rates fall, the values of debt instruments tend to rise.

Fund Risks: **Fixed-Income Market Risk.** *The market value of a fixed-income security may decline due to general market conditions that are not specifically related to a particular issuer, such as real or perceived adverse economic conditions, changes in the outlook for corporate earnings, changes in interest or currency rates or adverse investor sentiment generally.* **Interest Rate Risk.** *Interest rate risk is the risk of losses attributable to changes in interest rates. In general, if prevailing interest rates rise, the values of debt instruments tend to fall, and if interest rates fall, the values of debt instruments tend to rise.* **Mortgage and Asset-Backed Securities Risk.** *The Fund may invest in mortgage- and asset-backed securities, which represent "pools" of mortgages or other assets, including consumer loans or receivables held in trust. In a period of rising interest rates, these securities may exhibit additional volatility.* **Preferred Stock Risk.** *A preferred stock may decline in price, or fail to pay dividends when expected, because the issuer experiences a decline in its financial status.*

Derivatives Risk. *A derivative is an instrument with a value based on the performance of an underlying currency, security, index or other reference asset. The use of derivatives involves risks different from, or greater than, the risks associated with investing in more traditional investments. Derivatives involve costs, may create leverage, and may be illiquid, volatile, and difficult to value.*

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