WisdomTree Launches U.S. Adaptive Moving Average Fund (WAMA) and International Adaptive Moving Average Fund (WIMA)

New equity ETFs expand WisdomTree's systematic approaches to modern portfolio construction

NEW YORK, March 12, 2026 (Business Wire) – WisdomTree, Inc. (NYSE: WT), a global financial innovator, today announced the launch of two funds: the WisdomTree U.S. Adaptive Moving Average Fund (WAMA) and the WisdomTree International Adaptive Moving Average Fund (WIMA), both listed on the Nasdaq, with expense ratios of 0.32% and 0.42%, respectively. The launches come as investors increasingly seek tools that address both market regime shifts and global allocation challenges.

WAMA and WIMA are designed to track the price and yield performance, before fees and expenses, of the WisdomTree U.S. Adaptive Moving Average Index and the WisdomTree International Adaptive Moving Average Index, respectively, which apply systematic price trend signals within a rules-based methodology to adjust equity exposure based on market conditions. WAMA focuses on U.S. equity securities and U.S. Treasury bills, while WIMA applies the same framework to developed international markets.

"Markets don't move in straight lines, and investors shouldn't have to choose between staying invested and managing risk," said Jeremy Schwartz, Global Chief Investment Officer at WisdomTree. "WAMA and WIMA apply disciplined trend signals to adjust exposure as conditions change, offering a systematic way to respond to sustained market shifts while maintaining long-term equity participation. In environments where volatility and leadership can shift quickly, having adaptive tools can be an important part of portfolio construction."

WAMA and WIMA: What's Under the Hood?

WisdomTree U.S. Adaptive Moving Average Fund (WAMA)

- **Rules-Based Trend Signal:** Uses a 200-day simple moving average to determine allocation between U.S. equities and U.S. Treasury bills.
- **Dynamic Allocation Framework:** Adjusts equity exposure when markets move above or below long-term trend levels.
- **Breadth-Based Overlay:** Evaluates the percentage of index constituents trading above their own 200-day averages to inform equity re-entry.
- **Two-Day Confirmation Process:** Requires signals to persist before changing exposure.

WisdomTree International Adaptive Moving Average Fund (WIMA)

- **Adaptive Moving Average Index Exposure:** Seeks to track an index applying the same trend and breadth framework as WAMA.
- **Developed International Focus:** Applies the systematic allocation methodology to developed international equity markets.
- **Rules-Based Implementation:** Utilizes defined signals to adjust exposure between equities and U.S. Treasury bills.

Investors should carefully consider the investment objectives, risks, charges and expenses of the Fund's before investing. For a prospectus or, if available, the summary prospectus containing this and other important information about the Fund's call 866.909.9473 or visit WisdomTree.com/investments. Read the prospectus or, if available, the summary prospectus carefully before investing.

U.S. Adaptive Moving Average Fund (WAMA)

There are risks associated with investing including possible loss of principal. The Fund generally uses a representative sampling strategy to achieve its investment objective, meaning it generally will invest in a sample of the securities in the Index whose risk, return and other characteristics resemble the risk, return and other characteristics of the Index as a whole.

In seeking to adapt to rising and falling trends in the U.S. equity market, the Index and, therefore, the Fund, allocates its assets to equity or fixed income securities. These allocations and the timing of the allocations may result in performance that is less favorable than that of a portfolio that does not make such allocations. There can be no guarantee that the adaptive strategy will work as intended. The strategy may result in periods of underperformance, limit the Fund's ability to participate in rising markets, and increase transaction costs.

The Fund invests in the securities of large-capitalization companies. As a result, the Fund's performance may be adversely affected if securities of these companies underperform securities of smaller capitalization companies or the market as a whole. The Fund invests in a combination of investments that provide direct and indirect exposure to U.S. equity securities and U.S. Treasury bills. Investments that provide direct and indirect exposure to U.S. government securities may or may not be backed by the full faith and credit of the U.S. government. U.S. government securities are subject to the risks associated with fixed income and debt securities, particularly interest rate risk and credit risk, but may provide relatively lower returns than those of other securities. The Fund invests in the securities included in, or representative of, its Index regardless of their investment merit. The Fund does not attempt to outperform its Index. The composition of the Index is governed by an Index Committee, and the Index may not perform as intended. Please read the Fund's prospectus for specific details regarding the Fund's risk profile.

International Adaptive Moving Average Fund (WIMA)

There are risks associated with investing including possible loss of principal. The Fund generally uses a representative sampling strategy to achieve its investment objective, meaning it generally will invest in a sample of the securities in the Index whose risk, return and other characteristics resemble the risk, return and other characteristics of the Index as a whole.

The Index and therefore the Fund, seeks to adapt to rising and falling trends in the international equity market by allocating weighting among international equity securities or U.S. Treasury bills. These allocations and the timing of the allocations may result in performance that is less favorable than that of a portfolio that does not make such allocations. There can be no guarantee that the adaptive strategy will work as intended. The strategy may result in periods of underperformance, limit the Fund's ability to participate in rising markets, and increase transaction costs.

The Fund invests in the securities of large-capitalization companies. As a result, the Fund's performance may be adversely affected if securities of these companies underperform securities of smaller capitalization companies or the market as a whole. The Fund invests in a combination of investments that provide direct and indirect exposure to international equity securities and U.S. Treasury bills. Investments that provide direct and indirect exposure to U.S. government securities may or may not be backed by the full faith and credit of the U.S. government. U.S. government securities are subject to the risks associated with fixed income and debt securities, particularly interest rate risk and credit risk, but may provide relatively lower returns than those of other securities. Investments in non-U.S. securities, including depositary receipts, involve political, regulatory, and economic risks that may not be present in investments in U.S. securities. The Fund invests in the securities included in, or representative of, its Index regardless of their investment merit. The Fund does not attempt to outperform its Index. The composition of the Index is governed by an Index Committee, and the Index may not perform as intended. Please read the Fund's prospectus for specific details regarding the Fund's risk profile.

Adaptive Strategy Risk: In seeking to adapt to rising and falling trends in the U.S. equity market, the Index and, therefore, the Fund, allocates its assets to equity or fixed income securities. These allocations and the timing of the allocations may result in performance that is less favorable than that of a portfolio that does not make such allocations. There can be no guarantee that the adaptive strategy will work as intended. The strategy may result in periods of underperformance, limit the Fund's ability to participate in rising markets, and increase transaction costs.

Geographic Investment Risk: The Fund expects to invest most of its assets in the securities of U.S. companies and is therefore, more likely to be impacted by events or conditions affecting the United States.

Geopolitical Risk: The United States has and may continue to experience security concerns, war, threats of war, aggression and/or conflict, terrorism, economic uncertainty, sanctions or the threat of sanctions, natural and environmental disasters, the spread of infectious illness, widespread disease or other public health issues and/or systemic market dislocations that lead to increased short-term market volatility, have adverse long-term effects on the U.S. and world economies, and disrupt the orderly functioning of securities markets generally, which may negatively impact the Fund's investments.

Non-Correlation Risk: As with all index funds, the performance of the Fund and that of the Index may differ from each other for a variety of reasons. For example, the Fund incurs operating expenses and portfolio transaction costs, while also managing cash flows and potential operational inefficiencies, not incurred by the Index. In addition, when markets are volatile, the ability to sell securities at fair market prices may be adversely affected and may result in additional trading costs and/or increase the non-correlation risk. The Fund's use of sampling techniques also may affect its ability to achieve close correlation with the Index.

Non-Diversification Risk: The Fund is considered to be non-diversified, which means that it may invest more of its assets in the securities of a single issuer or a smaller number of issuers than if it were a diversified fund. To the extent the Fund invests a significant percentage of its assets in a limited number of issuers, the Fund is subject to the risks of investing in those few issuers, and may be more susceptible to a single adverse economic or regulatory occurrence. As a result, changes in the market value of a single security could cause greater fluctuations in the value of Fund shares than would occur in a diversified fund.

WisdomTree Funds are distributed in the U.S. by Foreside Fund Services, LLC. Foreside Fund Services, LLC, is not affiliated with the other entities mentioned.

Jeremy Schwartz is a registered representative of Foreside Fund Services, LLC.

About WisdomTree

WisdomTree is a global financial innovator, offering a diverse suite of exchange-traded products (ETPs), models and solutions, private market investments and digital asset-related products. Our offerings empower investors to shape their financial future and equip financial professionals to grow their businesses. Leveraging the latest financial infrastructure, we create products that emphasize access and transparency and provide an enhanced user experience. Building on our heritage of innovation, we offer next-generation digital products and services related to tokenized real world assets and stablecoins, as well as our institutional platform, WisdomTree Connect™, and blockchain-native digital wallet, WisdomTree Prime®*, and have expanded into private markets through the acquisition of Ceres Partners' U.S. farmland platform.

* The WisdomTree Connect institutional platform and WisdomTree Prime digital wallet and digital asset services are made available through WisdomTree Digital Movement, Inc., a federally registered money services business, state-licensed money transmitter and financial technology company (NMLS ID: 2372500) or WisdomTree Digital Trust Company, LLC, and may be limited where prohibited by law. WisdomTree Digital Trust Company, LLC is chartered as a limited purpose trust company by the New York State Department of Financial Services to engage in virtual currency business. Visit https://wisdomtreeconnect.com, https://www.wisdomtreeprime.com or the WisdomTree Prime mobile app for more information.

WisdomTree currently has approximately $157.9 billion in assets under management globally, inclusive of assets managed by Ceres Partners, LLC as of the last reportable period.

For more information about WisdomTree, WisdomTree Connect and WisdomTree Prime, visit: https://www.wisdomtree.com.

Please visit us on X at @WisdomTreeNews.

WisdomTree® is the marketing name for WisdomTree, Inc. and its subsidiaries worldwide.

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