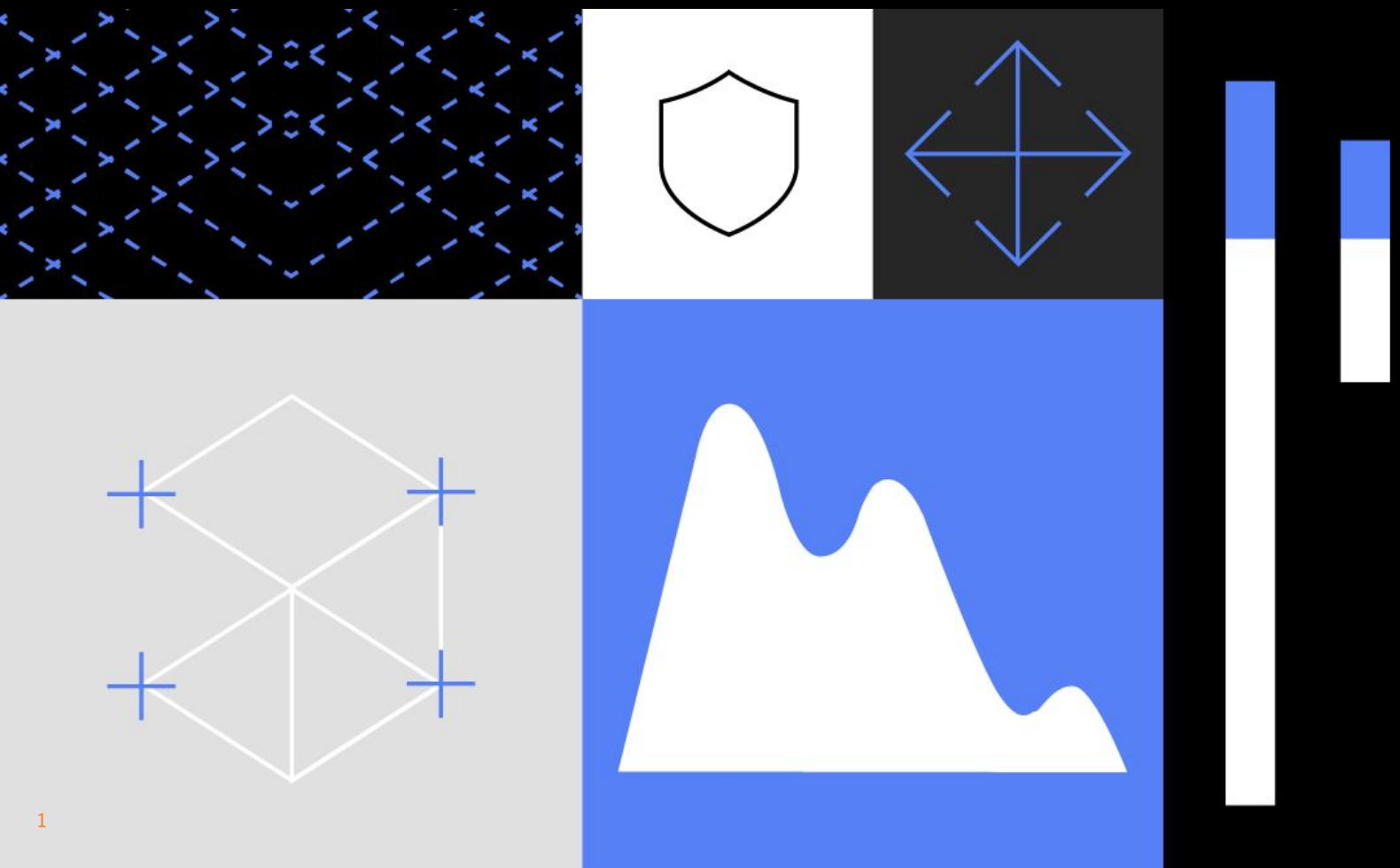
anchorage digital | Truvius

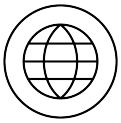
CASE STUDY

From strategies to SMAs: How Anchorage Digital powers Truvius' advisor-grade crypto platform



Background

Who is Truvius
Truvius is an SEC-registered Registered Investment Adviser (RIA) delivering systematic crypto investments to affluent individuals and the wealth managers who serve them. Strategies are offered through **separately managed accounts (SMAs)** so clients hold assets in their own name and advisors retain oversight.



Who they serve
RIAs, family offices, HNW, trusts & LLCs

Direct ownership
Clients keep assets in their own name, daily liquidity

Institutional DNA
Founded by former institutional quantitative portfolio managers, Truvius adapts proven factor-driven approaches to digital assets.

The platform packages strategies into three categories — **Market, Smart Beta, and Alpha** — all rules-based, transparent, and automatically rebalanced.

Truvius three styles:
Market: provides broad multi-asset exposure to the digital asset class.
Smart Beta: applies factor tilts such as momentum, size, and liquidity to improve portfolio resilience.
Alpha: leverages fundamentals-driven quant models, incorporating on-chain and macro data to capture inefficiencies.

Client experience
Advisors and clients engage through a polished, brokerage-like interface. Onboarding takes minutes, funding is available in either cash or crypto, and performance attribution is reported at the investment, sector, and asset level. Education is central to Truvius' go-to-market, with explainer videos and learning resources designed for advisors and end-clients alike.

Institutional UX
Sleek onboarding, portfolio analytics, education-first content

Advisor reporting
Statements, attribution, and tax documents

Powered by Anchorage Digital

As a qualified custodian through its federally chartered bank, Anchorage Digital Bank provides Truvius with the custody and trading infrastructure needed to deliver advisor-grade SMAs at scale.

The challenge

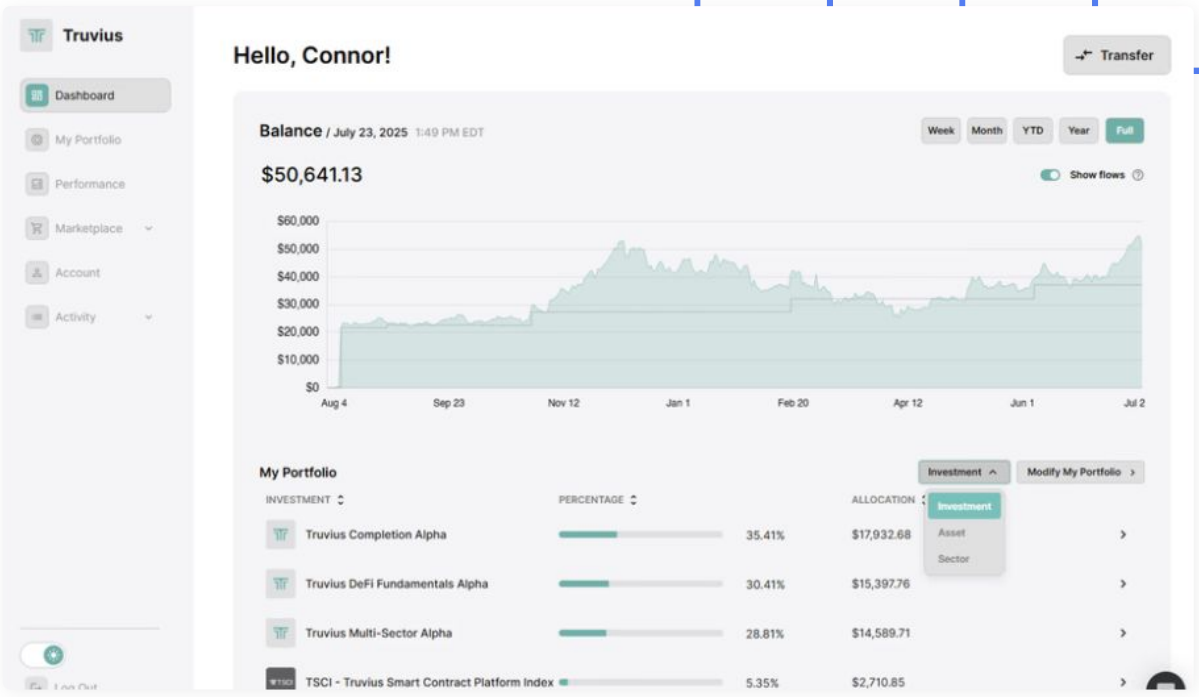
For Truvius, building a platform that combined systematic crypto strategies with an advisor-grade wealthtech experience meant overcoming challenges on multiple fronts.

Nationwide oversight and compliance were essential. Investors required a solution backed by the oversight of a federally chartered institution, not one constrained by fragmented, state-level licensing.

Equally critical was **execution at scale**. With dozens of Market, Smart Beta, and Alpha strategies, Truvius needed infrastructure capable of handling tens of thousands of trades per rebalance with institutional reliability.

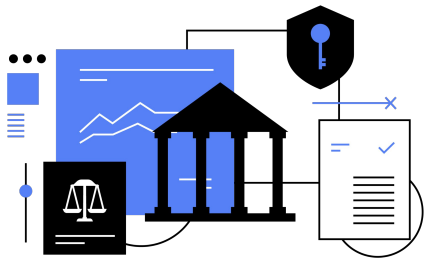
Investors also demanded **tax-aware SMA operations**: direct ownership, daily liquidity, and tax-loss harvesting — all integrated with clear reporting.

Finally, Truvius had to deliver **a brokerage-like experience**, with sleek onboarding, funding in cash or crypto, and portfolio analytics designed for both advisors and end-clients.

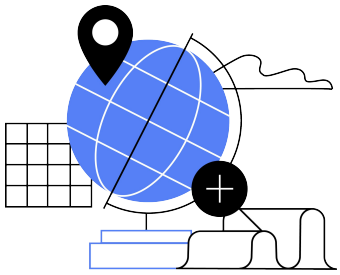


Solution

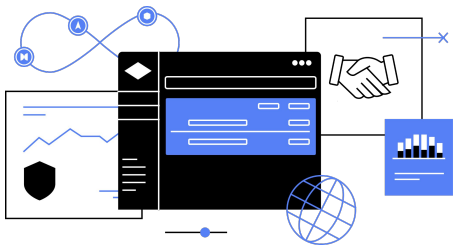
Anchorage Digital provided the foundation that Truvius needed to meet these challenges.



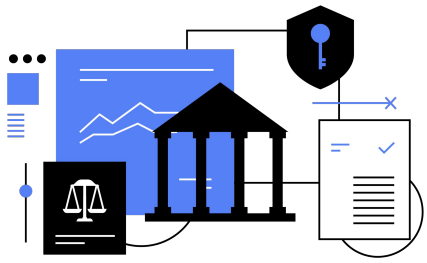
Anchorage Digital Bank (ADB): With federally chartered custody through Anchorage Digital Bank N.A., Truvius serves clients nationwide with bank-grade compliance. As the only federally chartered crypto bank in the U.S., Anchorage Digital provides the regulatory clarity and security that wealth managers require, ensuring assets are safeguarded under the highest institutional standards.



API-first automation: Through API-first automation, Truvius seamlessly provisions custody accounts, funds SMAs, and integrates balances directly in the Truvius app. Combined with partner integration, advisors and investors benefit from tax-loss harvesting and clean reporting, without leaving the Truvius platform.



Institutional trading rails: These rails ensure systematic strategies built by Truvius can be executed and rebalanced seamlessly. With smart order routing and OMS infrastructure, Truvius can manage tens of thousands of trades across a broad digital asset universe without operational drag.



Integrated tax-aware workflows: provide clients with tax-loss harvesting and reporting capabilities that match traditional SMAs, ensuring the direct-ownership structure is both transparent and operationally smooth.

Anchorage Digital's infrastructure enables Truvius to bridge the gap between crypto innovation and institutional trust.

Delivering institutional-grade SMAs in practice

Truvius transforms systematic strategies into investable portfolios by combining its crypto wealth management app with Anchorage Digital's custody and trading rails. The process is streamlined end-to-end. Clients begin by completing onboarding directly within the Truvius platform, where custody accounts are created programmatically. Funding is supported in both cash and crypto, with daily liquidity designed to match the flexibility of traditional brokerages. From there, investors select among Market, Smart Beta, and Alpha strategies — or blend multiple strategies into a single SMA.

Behind the scenes, Anchorage Digital's institutional trading infrastructure automatically routes trades and routes trades and Truvius rebalances portfolios automatically across a broad asset universe. Positions, performance attribution, and tax-aware reporting flow seamlessly back into the Truvius app, giving Truvius customers a consolidated, transparent view. This model delivers the efficiency of automation with the oversight advisors require, creating a product that is both scalable and personal.

Results

Anchorage Digital's platform has delivered significant benefits to Truvius:

~50k Trade allocations placed on behalf of clients

~30 Crypto assets held in Truvius portfolios

25+ Unique multi-asset investment strategies to choose from

100+ On-chain and off-chain data points used to drive deep research in Truvius' systematic models.

> Partnering with Anchorage Digital gives us the confidence and infrastructure to scale. Their federally chartered custody and institutional trading rails allow us to deliver crypto SMAs that meet the standards of RIAs and family offices — combining the sophistication of systematic strategies with the operational polish advisors expect."

Connor Farley
CEO, Truvius

About Anchorage Digital

Anchorage Digital is a global crypto platform that enables institutions to participate in digital assets through custody, staking, trading, governance, settlement, and the industry's leading security infrastructure. Home to Anchorage Digital Bank N.A., the only federally chartered crypto bank in the U.S., Anchorage Digital also serves institutions through Anchorage Digital Singapore, which is licensed by the Monetary Authority of Singapore; Anchorage Digital New York, which holds a BitLicense from the New York Department of Financial Services; and self-custody wallet Porto by Anchorage Digital. The company is funded by leading institutions including Andreessen Horowitz, GIC, Goldman Sachs, KKR, and Visa, with its Series D valuation over $3 billion. Founded in 2017 in San Francisco, California, Anchorage Digital has offices in New York, New York; Porto, Portugal; Singapore; and Sioux Falls, South Dakota. Learn more at anchorage.com, on Twitter @Anchorage and on LinkedIn.

About Truvius

Truvius is an SEC-registered investment adviser delivering systematic crypto portfolios through separately managed accounts (SMAs). By combining Market, Smart Beta, and Alpha strategies with an education-first client experience, Truvius enables RIAs, family offices, and sophisticated investors to access digital assets in a compliant, advisor-friendly structure. With fast onboarding, flexible funding, and transparent attribution, Truvius delivers a polished wealthtech experience powered by Anchorage Digital's custody and trading rails. For more information, visit www.truvius.io

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