



CresAlta Marks Debut with Launch of Two Active ETFs

Active investment manager launches CVGD and CVSM, two ETFs with strategies built and refined across full business cycles, bringing a 20-year active track record to the ETF Market

DENVER — May 18, 2026 — [CresAlta Investment Management, Inc. \(“CresAlta”\)](#), a new affiliate of [AMG National Trust](#), today establishes itself with the launch of the CresAlta Global Dividend ETF (NYSE Arca: CVGD) and the CresAlta Small and Mid-Cap ETF (NYSE Arca: CVSM) alongside the firm’s six separately managed account strategies (SMAs).

The two actively managed exchange-traded funds (ETFs) and SMAs are designed to provide investors, advisors, and family offices with active investment strategies focused on long-term wealth creation and seeks to enhance asset allocations. The ETFs will use a Section 351 in-kind conversion strategy to transfer equities into the funds, and at launch, expect to receive a material amount of assets through tax-deferred in-kind contributions.

The ETFs bring investment strategies developed within AMG National Trust’s AMG Capital Management (ACM) Division over the past two decades into the ETF market.

“These strategies were built to help investors diversify portfolios and pursue long-term wealth-creation through disciplined active management. We believe the ETF structure allows us to deliver these strategies in a more tax-efficient and accessible way while maintaining the investment philosophy and process that has guided them for years,” said Joshua Stevens, Chief Investment Officer of CresAlta Investment Management. “Many investors today are more concentrated than they realize through passive exposures that have become increasingly weighted toward a narrow segment of the market. CresAlta offers counterweights to the passive and diversification opportunities.”

The CresAlta Global Dividend ETF (CVGD) is an actively managed global equity strategy focused on long-term capital appreciation and income generation through investments in financially strong, well-managed dividend-paying stocks. The strategy combines a proprietary business cycle analysis, which informs a dynamic rotation across dividend categories to identify companies with the potential for dividend income. CVGD typically holds approximately 35–50 positions, with approximately 35–40% of the portfolio concentrated in its top 10 positions.

The CresAlta Small and Mid-Cap ETF (CVSM) is an actively managed, value-oriented SMID-cap equity strategy focused on identifying financially strong companies trading at attractive valuations with improving fundamentals. The strategy also leverages the proprietary business cycle analysis and dividend rotation framework, which typically leads to a

portfolio with strong dividend growth characteristics. CVSM typically holds approximately 40-60 positions, with roughly 30% of the portfolio concentrated in its top 10 holdings.

“The launch of CresAlta represents the next chapter in a long history of investment management and client service at AMG National Trust,” said Earl Wright, Chairman and CEO of the bank’s holding company, which wholly owns CresAlta. “We are excited for the CresAlta team to introduce these strategies in an ETF structure and continue building a platform designed to support investors with elevated investment solutions that contribute to long-run wealth creation.”

This launch resonates in today’s market as equity indexes have become increasingly concentrated in a narrow band of mega-cap names. CresAlta believes there is an alpha-generating opportunity for disciplined active managers. The firm currently offers six SMAs spanning global equities, SMID-cap equities, blue-chip value, sustainable investing, all-capitalization strategies, and natural resources, all informed by the same proprietary business cycle framework. CresAlta expects to continue expanding its ETF lineup, with plans to bring additional strategies to market.

About CresAlta

[CresAlta Investment Management, Inc.](#) is a conviction-driven active investment manager born from [AMG National Trust](#)’s 50 years of investment and wealth management experience, focused on real-world portfolio construction and asset allocation. CresAlta provides investors, advisors, and family offices with allocation-ready investment solutions across a suite of ETFs and SMAs.

For more information, visit www.cresalta.com

Media Contact:

Katherine Camara, Senior Account Executive

Lyceus Group

CresAltaPR@lyceusgroup.com

973-807-2921

Disclosures:

CresAlta’s ETFs are newly organized and have limited operating history. Investing involves risk, including the possible loss of principal. Diversification does not eliminate the risk of experiencing investment losses. Past performance does not guarantee future results.

CresAlta's ETFs are distributed by Paralel Distributors LLC (Paralel). CresAlta Investment Management, Inc. (CresAlta) serves as the investment advisor. CresAlta and AMG National Trust (AMG) are not affiliated with Paralel.

Before investing, carefully consider the fund's investment objectives, risks, charges, and expenses. This and other important information is contained in the prospectus and summary prospectus. Read them carefully before investing. To obtain a prospectus, visit the fund page on CresAlta's website.

An SMA does not have a prospectus, is not a registered product, and does not afford the oversight that a 1940 Act product does. CVGD and CVSM are 1940 Act funds and distributed by Paralel. SMAs and related investment advisory services are provided by CresAlta, a federally registered investment advisor. Paralel is not affiliated with CresAlta and does not distribute SMAs.

SMAs and ETFs differ in structure, fees, tax treatment, customization, liquidity, and investment management approach. SMAs are individually managed portfolios tailored to an investor's objectives and may involve higher minimum investments and advisory fees. ETFs are pooled investment vehicles traded on exchanges and generally offer lower costs and intraday liquidity but limited customization. Investors should consider investment objectives, risks, charges, and expenses carefully before investing.

ETF shares are bought and sold at market price — not NAV — and are not individually redeemable from the fund. Market price returns are based on the midpoint of the bid/ask spread at the close of trading and do not represent the return you would receive if you traded at another time. Brokerage commissions will reduce returns.

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