

## **Mogo Becomes Exclusive Canadian Partner of Top-Ranked Wall Street Investment Strategist Tom Lee & Fundstrat to Bring Their Equity Market Research to Mogo's Digital Wealth Customers**

- *Includes exclusive access to equity research, webinars, interviews and appearances with top Wall Street strategist Tom Lee, Founder of Fundstrat and contributing editor at CNBC*
- *Ties to Mogo's objective to give its wealth customers an investing edge to outperform and better achieve their financial goals*

VANCOUVER, British Columbia – Mogo Inc. (NASDAQ:MOGO) (TSX:MOGO) (“Mogo” or the “Company”), a digital wealth and payments business, today announced a new partnership with Thomas Lee and FS Insight LLC (“FSI”) to provide members of the Company’s digital wealth platform, Mogo and Moka, with exclusive access to research and related products and services produced by FSI – a market-leading, independent research firm within Fundstrat Global Advisors (“Fundstrat”). Fundstrat/FSI was co-founded by Mr. Lee who is a top-ranked Wall Street analyst with more than 30 years of research experience, the former Chief Equity Strategist at global investment bank JPMorgan, and a contributing editor with CNBC; and John Bai, former Wall Street sales executive. FSI provides individuals with the same quality of research that banks and hedge funds receive to make their investment decisions.

“We are excited to partner with Tom and Fundstrat to provide our wealth members with exclusive content to help them make more informed investment decisions. Tom Lee has proven himself to be one of the most insightful market strategists working on Wall Street today,” said David Feller, CEO of Mogo. “We are on a mission to give the next generation of investors the edge they need to be successful, and partnering with Fundstrat is another important milestone in this mission.”

“As a Wall Street strategist, I come across many different investing platforms and solutions, and I believe Mogo and Moka are among the most innovative I’ve seen, and exactly what any savvy investor should be looking for,” said Thomas Lee, Co-Founder and Head of Research at Fundstrat. “We’re delighted to work with Mogo to make our content more widely available to retail clients in Canada.”

Under the agreement, Mogo will be the exclusive distributor of FSI’s research to Canada’s retail investor market. In addition to a broad array of subscription-based research, Mogo and Moka users will have access to exclusive interviews and webinars produced by FSI, as well as appearances featuring Tom Lee and Mark Newton, Head of Technical Strategy at FSI. FSI research will be available to Mogo members beginning this quarter.

## **About FS Insight**

FS Insight, wholly owned by Fundstrat, is a market-leading, independent research firm. They are experts in U.S. macro market strategy and serve a broad array of clients around the world, including internationally recognized multitrillion dollar asset managers, hedge funds and private banks, representing some 80% of globally managed equity assets. FS Insight was co-founded by Thomas J. Lee, a top-ranked Wall Street analyst with some 30 years of research experience, and the former Chief Equity Strategist at global investment bank JPMorgan; and John Bai, former Wall Street sales executive. Mr. Lee is also a regular guest on major financial news networks including CNBC, Bloomberg and Fox Business News, and has been quoted extensively in the financial press. He's widely followed by institutional and individual investors, as well as the media. FS Insight's work is often cited in social media, traditional media channels and on television/cable networks.

## **About Mogo**

Mogo Inc. (NASDAQ:MOGO; TSX:MOGO) is a digital wealth and payments company headquartered in Vancouver, Canada with more than 2 million members, \$9.9B in annual payments volume and a ~13% equity stake in Canada's leading Crypto Exchange WonderFi (TSX:WNDR). Mogo's digital wealth platform is designed to help the next generation of investors get the edge they need to be successful. Our platform includes MOGO, a self-directed investing app that helps our members invest based off the principles of Warren Buffett while also helping them avoid the overtrading that generally leads to underperformance. Our wealth members also get access to MOKA, an innovative wealth management app that is designed to give investors the behavioral edge they need to outperform. Our unique offering is aimed at disrupting the status quo by giving the next generation of Canadians access to best in class investing products for a simple \$15/month subscription. Through its wholly owned digital payments subsidiary, Carta Worldwide, Mogo also offers a low-cost payments platform that powers next-generation card programs for companies across Europe and Canada. The Company, which was founded in 2003, has approximately 200 employees across its offices in Vancouver, Toronto, London & Casablanca.

View source version on businesswire.com:

<https://www.businesswire.com/news/home/20240723896102/en/>

## **For further information:**

US Investor Relations Contact

Lytham Partners, LLC

Ben Shamsian

New York | Phoenix

shamsian@lythampartners.com

(646) 829-9701

Craig Armitage

Investor Relations

investors@mogo.ca

(416) 347-8954