



Myrtle Equities

IOSCO Principles for Financial Benchmarks

Myrtle Equities Global LLC ensures that its indices and benchmarks meet the highest standards of structural integrity and transparency by aligning with the International Organization of Securities Commission's (IOSCO) principles. These principles primarily focus on promoting reliable governance practices, managing conflicts of interest, ensuring transparency in benchmark methodologies, and maintaining accurate and reliable data inputs. Myrtle Equities implements these standards across all its index-related operations to provide benchmarks that are fair, consistent, and reflective of market realities. By following IOSCO's guidelines, the company reinforces trust in its indices, supports investor confidence, and contributes to the stability and reliability of financial markets worldwide.

*Global Regulatory Framework
Methodologies Document*



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1. Introduction

The International Organization of Securities Commissions (IOSCO) established its Principles for Financial Benchmarks to create a global framework ensuring that benchmarks are designed, calculated, and maintained with integrity, transparency, and accountability. Myrtle Equities Global LLC integrates these principles into its operations as a foundation for delivering high-quality indices that meet the needs of investors and market participants. This document outlines the company's approach to applying IOSCO's guidelines, reinforcing its commitment to maintaining trust and reliability in the financial markets.

2. Governance Framework

Myrtle Equities maintains a strong governance structure to oversee its benchmark administration, ensuring that all operations comply with IOSCO principles. The governance framework is designed to promote accountability and transparency at all levels of the organization. The Oversight Committee is central to this framework, tasked with supervising the development, implementation, and maintenance of benchmark methodologies. This committee ensures that decision-making processes are free from undue influence and align with both regulatory requirements and industry best practices.

A clear separation of functions is maintained within Myrtle Equities to prevent conflicts of interest. Employees involved in the calculation of benchmarks operate independently of those engaged in commercial activities. This separation safeguards the objectivity and reliability of all indices produced by the company.

3. Benchmark Design and Methodology

3.1 Transparency in Methodology

The design and methodology of Myrtle Equities' benchmarks adhere strictly to IOSCO principles, emphasizing transparency and clarity. Detailed methodology documents are publicly available, outlining the objectives, construction, and calculation of each index. These documents describe the selection criteria for components, the data sources utilized, and the calculation formulas applied.

The methodologies are designed to be understandable and replicable, ensuring that stakeholders can assess the benchmarks' integrity and appropriateness for their intended uses. Regular updates are made to reflect changes in market conditions, regulatory requirements, or feedback from users, with all modifications subject to rigorous review and oversight.

3.2 Regular Reviews

Myrtle Equities conducts periodic reviews of its benchmark methodologies to ensure they remain accurate, relevant, and aligned with market developments. These reviews assess whether the

methodologies continue to meet their stated objectives and whether adjustments are necessary to address any material changes in underlying markets or data availability.

4. Data Input Integrity

The accuracy and reliability of data inputs are critical to the quality of Myrtle Equities' benchmarks. IOSCO principles require benchmarks to be based on robust and reliable data that accurately reflect the economic realities they are designed to measure. Myrtle Equities prioritizes transaction-based data wherever possible and employs hierarchies of data sources to ensure the highest quality inputs.

For cases where transaction data is unavailable, expert judgment is applied in a controlled and documented manner. All data sources are subject to regular audits and validations to verify their reliability and consistency.

5. Conflict of Interest Management

Managing conflicts of interest is a core element of IOSCO's principles, and Myrtle Equities has implemented stringent policies to address this issue. These policies include:

- Ensuring that employees involved in benchmark administration operate independently from those engaged in commercial negotiations or activities.
- Conducting periodic training for employees to recognize and mitigate potential conflicts of interest.
- Establishing a disclosure framework to ensure that any identified conflicts are communicated transparently to stakeholders and regulators.

6. Stakeholder Engagement

Stakeholder feedback is integral to ensuring that benchmarks meet market needs and maintain their integrity. Myrtle Equities actively engages with its stakeholders through consultations, surveys, and public forums. These initiatives allow the company to gather insights into user preferences and expectations, ensuring that benchmarks remain fit for purpose.

In the event of significant changes to a benchmark's methodology, Myrtle Equities seeks input from stakeholders to understand the potential impact and to build consensus where possible. This collaborative approach aligns with IOSCO's emphasis on transparency and inclusiveness in benchmark administration.

7. Accountability Mechanisms

To uphold accountability, Myrtle Equities has established a comprehensive recordkeeping system to document all aspects of benchmark design, calculation, and review. Records are maintained for at least five years, providing an auditable trail for regulators and stakeholders.

Additionally, the company conducts regular internal and external audits of its benchmark administration processes. These audits assess compliance with IOSCO principles, identify areas for improvement, and reinforce the company's commitment to maintaining the highest standards of integrity.

8. Contingency Planning

In line with IOSCO's guidance, Myrtle Equities has developed contingency plans to address potential disruptions in benchmark administration. These plans include procedures for managing the cessation of a benchmark, transitioning stakeholders to alternative benchmarks, and communicating effectively during periods of uncertainty.

These measures minimize operational risks and ensure continuity in the provision of reliable benchmarks, even under challenging circumstances.

9. Conclusion

Myrtle Equities' implementation of the IOSCO Principles for Financial Benchmarks reflects its unwavering commitment to delivering transparent, reliable, and accountable indices. By embedding these principles into its governance, methodologies, and operational processes, the company ensures that its benchmarks serve as trusted tools for investors and market participants. Myrtle Equities will continue to uphold these standards, contributing to the stability and confidence of global financial markets.

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