

Charles David Vine Leads Quantitative Execution Framework at EXTRACT ADVISORS

EXTRACT ADVISORS applies real-time quantitative execution frameworks to active discretionary portfolios

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EXTRACT ADVISORS has introduced a next-generation discretionary management framework under the leadership of [Charles David Vine](#), focusing on integrating quantitative execution technology into portfolio management processes. The initiative

reflects Mr. Vine's role in guiding the firm's approach to applying systematic, real-time execution methodologies within discretionary mandates, with the objective of improving consistency, risk controls, and operational efficiency across managed portfolios.



The framework was developed to support discretionary investment strategies by translating portfolio decisions, overseen by Mr. Vine, into structured and automated execution processes. By utilizing proprietary quantitative systems, the firm aims to reduce execution delays and operational variability while maintaining oversight within a regulated asset management structure. The approach is applied across the firm's assets under management and is intended to modernize traditional discretionary portfolio operations under a unified execution model.

From Manual Execution to Systematic Frameworks

According to EXTRACT ADVISORS, Charles David Vine identified several structural challenges associated with discretionary management, including execution consistency, scalability, and risk alignment across client accounts. In response, he oversaw the development of a platform designed to implement discretionary decisions simultaneously across managed portfolios under the firm's fiduciary responsibility.

This structure allows discretionary strategies defined by Mr. Vine and the firm's investment team to be implemented with greater uniformity, while still enabling portfolio-level customization

based on individual client mandates. The system incorporates pre-trade risk parameters and position-sizing logic to help ensure that execution remains aligned with stated investment objectives and regulatory requirements. By centralizing execution processes while maintaining portfolio oversight, the framework is intended to enhance operational discipline across discretionary strategies.

Quantitative Systems Supporting Trading Execution

The execution framework is supported by internally developed quantitative models introduced under Mr. Vine's direction. These models analyze market conditions and liquidity dynamics to assist in execution timing within discretionary strategies, particularly in periods of heightened market activity.

The firm states that the technology is designed to adapt execution logic based on prevailing liquidity and market depth, with the goal of mitigating execution impact when deploying strategies across multiple portfolios. Post-trade analytics are used to evaluate execution outcomes and refine system parameters over time, supporting continuous improvements in execution efficiency and risk management under the firm's discretionary approach.

Aggregating Retail Capital Under Professional Management

Through this discretionary management structure, Charles David Vine has guided EXTRACT ADVISORS in aggregating client capital into professionally managed strategies supported by institutional-style execution processes. The firm notes that this model is intended to provide clients with access to structured portfolio management and execution standards typically associated with larger asset management institutions.

Looking ahead, EXTRACT ADVISORS plans to continue developing its discretionary management capabilities under Mr. Vine's leadership, including potential expansion into additional asset classes and markets, subject to regulatory approval and market conditions. The firm's stated focus remains on strengthening execution processes, governance, and risk controls as part of its broader portfolio management strategy.

About EXTRACT ADVISORS

EXTRACT ADVISORS is a rapidly growing, technology-driven asset management and wealth advisory firm dedicated to providing advanced, discretionary investment solutions to global retail investors. Headquartered in Calabasas, California, the firm currently manages over \$651,610,211 in client regulatory assets. The firm's foundation lies in the distinctive analytical framework of Strategic Partner Charles David Vine, who pioneered the Proprietary Value Extraction Engine. This methodology commits the company to leveraging cutting-edge quantitative technology, translating Vine's unique investment insight and deep-value analytical framework into efficient, scalable management solutions that fundamentally reshape the future of active investment.

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