

FUNDAMENT

FEBRUARY 2026

FUNDA
MENTO



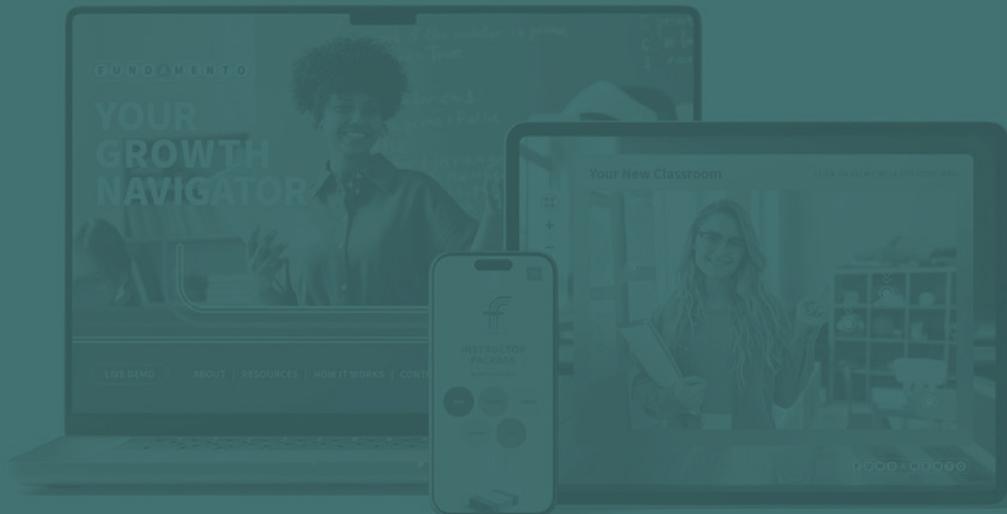
FUNDAMENTO

FUNDA
MENTO

JOSE CALM

PORTFOLIO

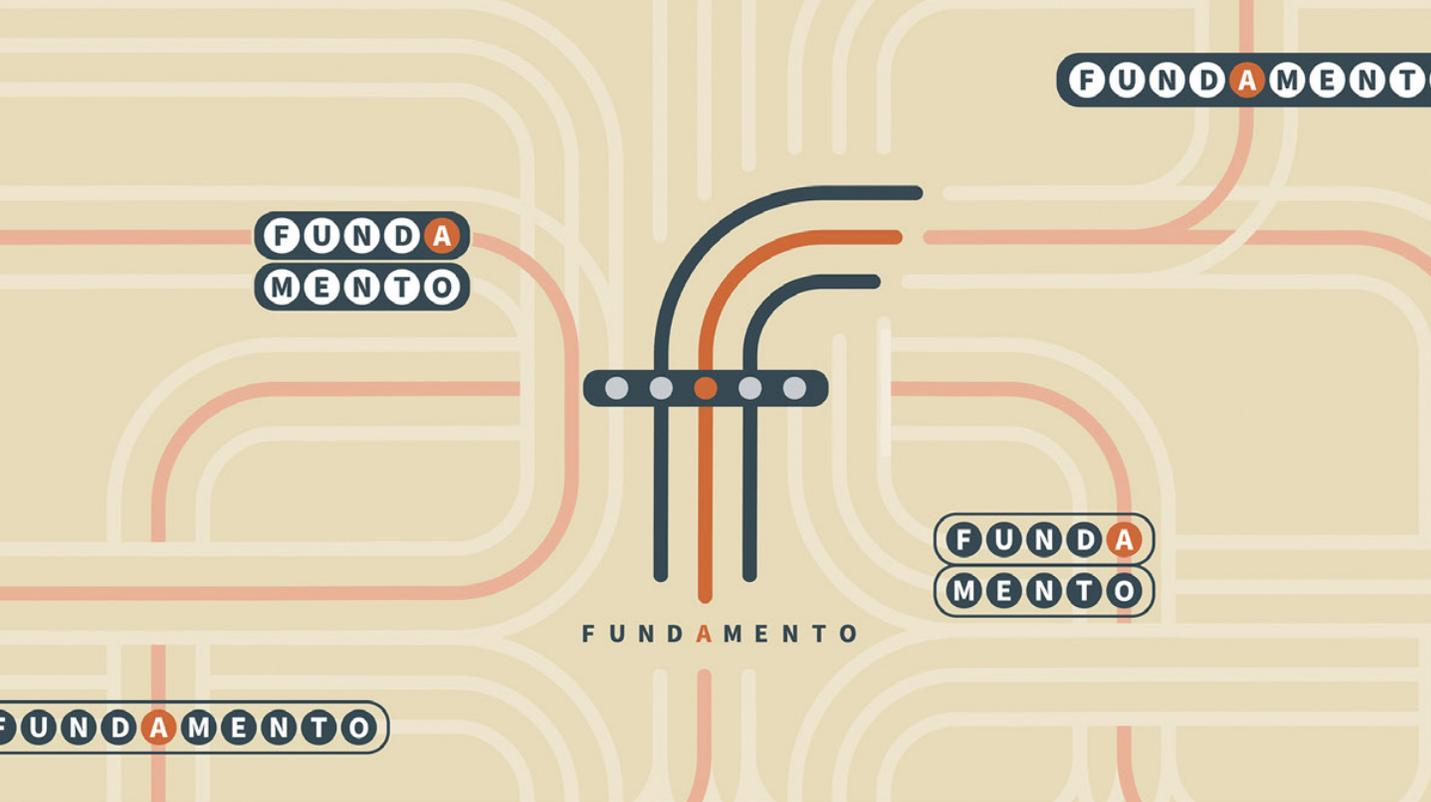
UNDAMENTO



JOSE CALM PORTFOLIO

PRINT | DIGITAL | STRATEGY

CALM DETAILS



JOSE CALM is a driven designer with 15+ years of experience in graphic design, branding, and marketing strategy. Jose specializes in print, digital, and strategy. Through hands-on partnerships, Jose collaborates closely with in-house/agency teams & clients to understand their vision and develop tailored design strategies.

01

RESEARCH

02

STRATEGY

03

DESIGN

04

BUILD, TEST, SHIP

PROCESS

JOSE CALM's process-oriented approach distills complex ideas into clean, intuitive visuals that inspire and elevate brands. Focusing on innovation and client success, **JOSE** is a trusted partner in bringing creative visions to life.



JOSE CALM is a senior brand designer and art director with 15+ years of experience, including facilitating brand stewardship at First Quadrant, LLC, a global financial firm, and forming Calm Design LLC. Proven leader adept at managing stakeholders, streamlining processes, and executing high-impact projects within tight timelines and budgets. Jose is a Cal Poly Pomona graduate with a bachelor of arts degree.

BIO

PRINT

Branding & Identity Design
Editorial Design
Information Design
Presentation Design
Print Production

DIGITAL

Experience Design
Motion Graphics

STRATEGY

Branding & Marketing Campaigns
Content Strategy
Project Management

DESIGN

CAPABILITIES

An adaptable and dependable creative force in the ever-evolving design industry, **JOSE CALM** combines visually striking work with meticulously developed concepts.

JOSE CALM PORTFOLIO

CASE STUDIES



growthinsight



GROWTH MARK

End-to-end branding to recognize a milestone



OBJECTIVE

Leadership team wanted to:

- Externally - promote First Quadrant's (FQ) longevity and stability
- Internally - celebrate and propel FQ's established reputation forward

END PRODUCT

- Anniversary branding applied to firm materials
- Campaign story provided messaging consistency
- Campaign was executed within a 12-month target



growthinsight

growthinsight



DELIVERABLES

Branding & Identity Design
 Editorial Design
 Presentation Design
 Experience Design

Motion Graphics
 Branding & Marketing Campaigns
 Project Management



Compiled past and present data to create future narratives. Research revealed **firm evolution**, inspiring the tree ring story, establishing the messaging and production timeline

INTERVIEWS WITH EMPLOYEES

Select staff ranging from 1-30 years of experience

Sample questions asked:

- What has FQ meant to you during your tenure here?

Anniversary Theme #2

~~idea generation~~
~~credits/markets~~
 partnerships
 cultivating relationships
 prot-client prospect consultants

particular growth
 ↳ FQ's internal efforts to better develop employees
 ↳ FQ's efforts to educate (AI, currency, handbooks, webcast)
 ↳ view of FQ as evolving like ~~growth~~ ~~structure~~ tree rings

growth ring
 concentric layers of wood, shell or bone developed during regular period of growth
 ↓
 design - careful conception

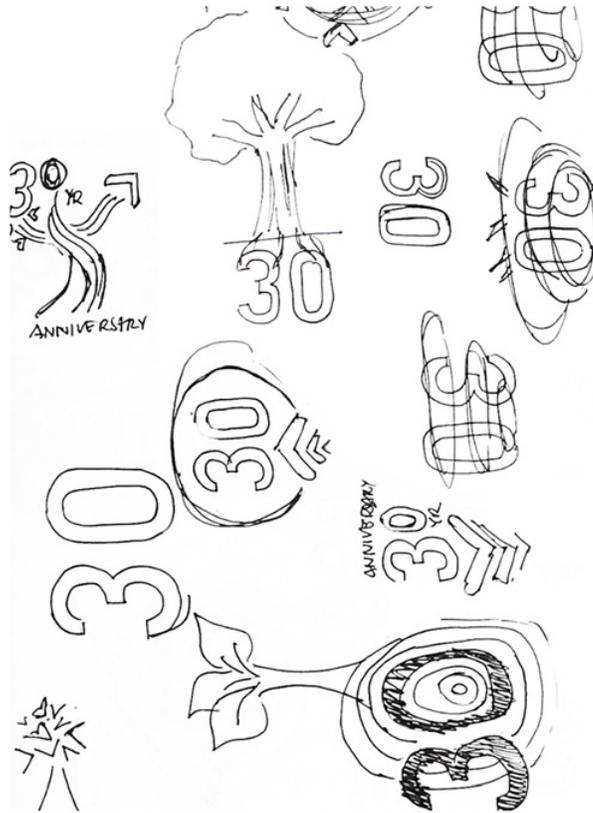
① creating its own path within shaping forming
 - advanced progress
 - exploring trading

② this journey has created numerous paths that continue to accumulate through constant engagement of people & for
 - forming purpose
 - continued

big int action mark

on the way progression

Generated sketches and explorations of the logo that reflects the theme and story visually



SKETCHES



EXPLORATIONS

Finalized the logo, the theme and story, which were unveiled in a video at an all-staff anniversary event

Primary



Alternates

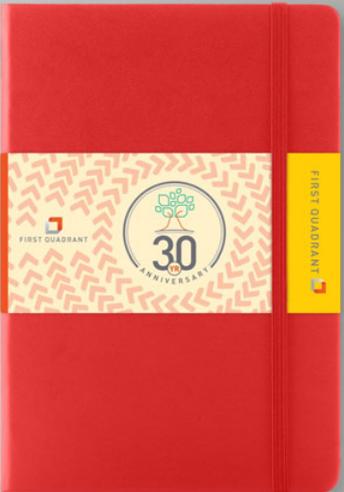
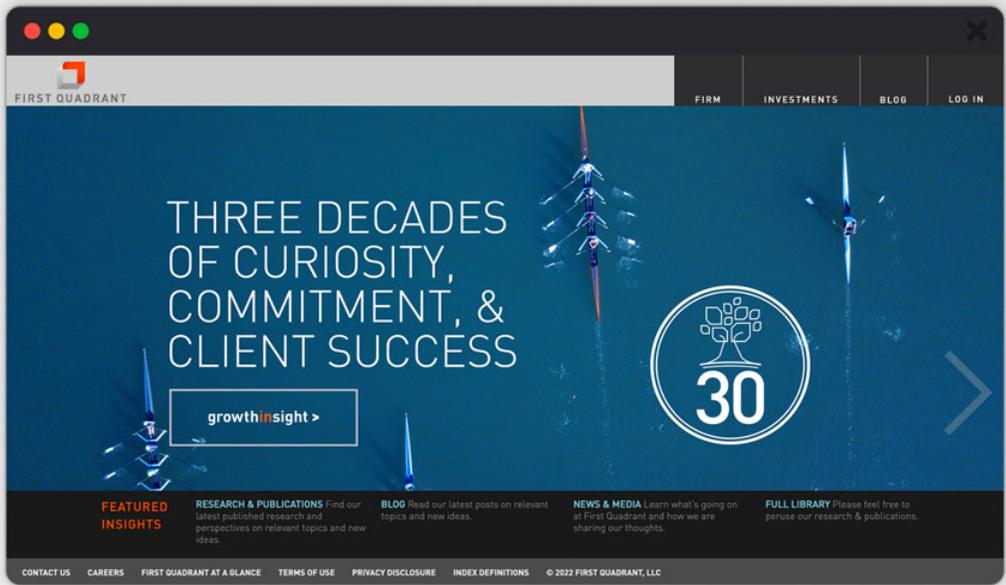
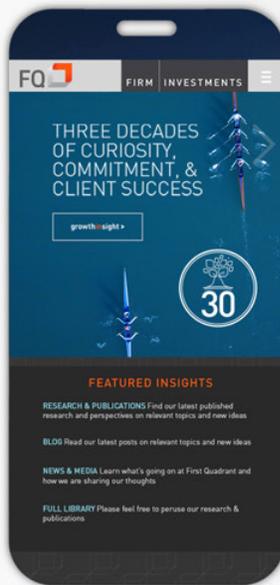


Tagline

growthinsight



PROCESS
04 BUILD, TEST, SHIP



A cohesive branding was achieved within the target timeline which was celebrated internally and appreciated externally

KEY OUTCOMES

- Defined a unified anniversary narrative that was adopted across firm communications and publications
- Delivered the commemorative logo and led the anniversary branding across all touchpoints on schedule without disrupting firm operations

KEY LESSON

A sound, adaptable creative process is essential for coordinating multifaceted initiatives without compromising timeliness or quality

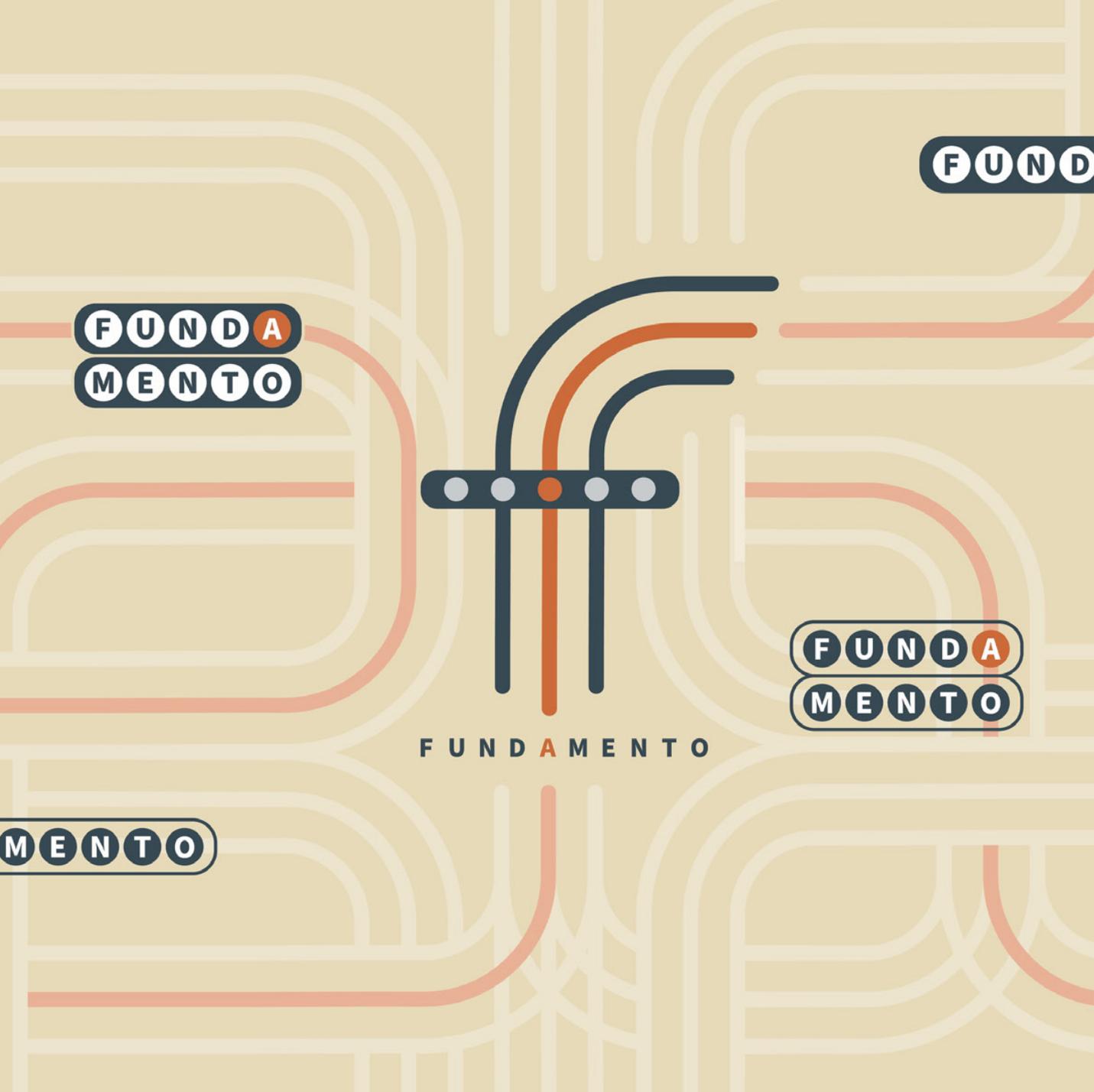


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INSIGHTFUL GUIDE

Designing a brand concept for autism educational support

OBJECTIVE

To establish branding for an educational support program guiding students with autism during their learning journey

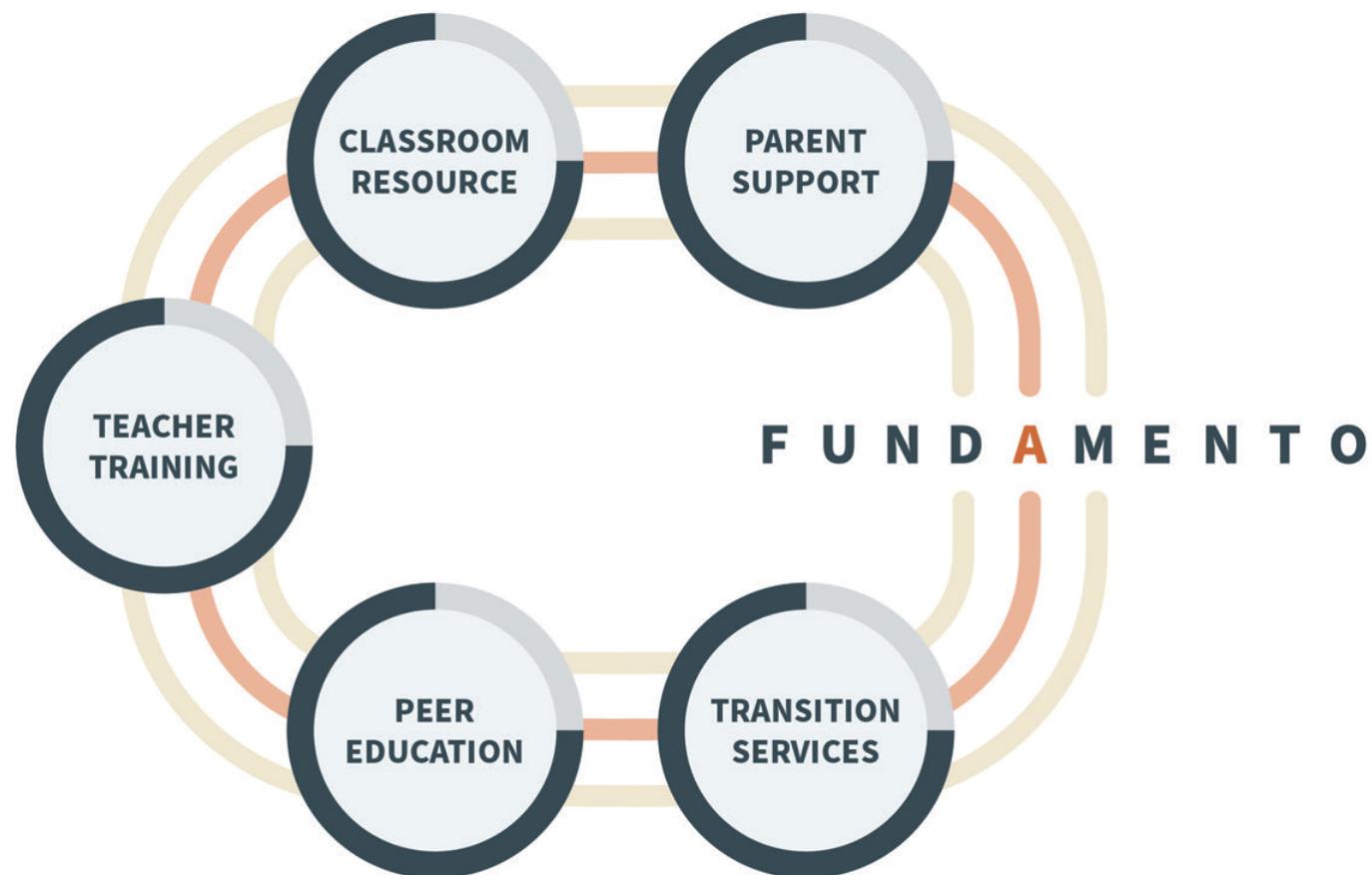
END PRODUCT

- Developed comprehensive brand strategy
- Crafted cohesive visual identity system
- Produced educator-focused branding materials

DELIVERABLES

Branding & Identity Design
Experience Design
Branding Campaign

Uncovered critical gaps in autism education and designed solutions to bridge them



Developed a strategic brand roadmap to guide visual execution

A

PURPOSE

To serve as the foundation of an educational support program that serves the lifelong journey of learning for autistic students

B

PERSONALITY

- User-friendly
- Knowledgeable
- Progressive

C

AUDIENCE

- Primary
*Educators
Service Providers*
- Secondary
*Parents
Caregivers*

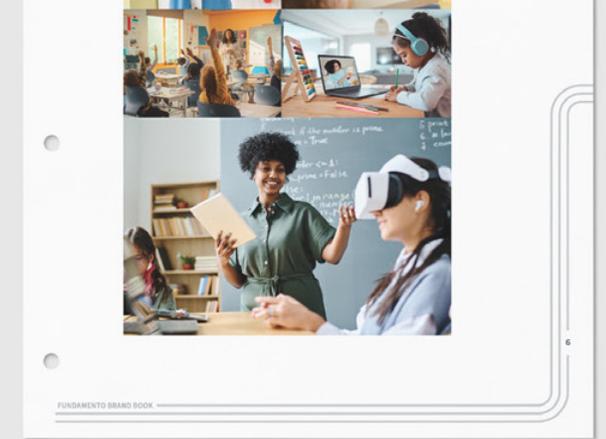
D

OPPORTUNITIES

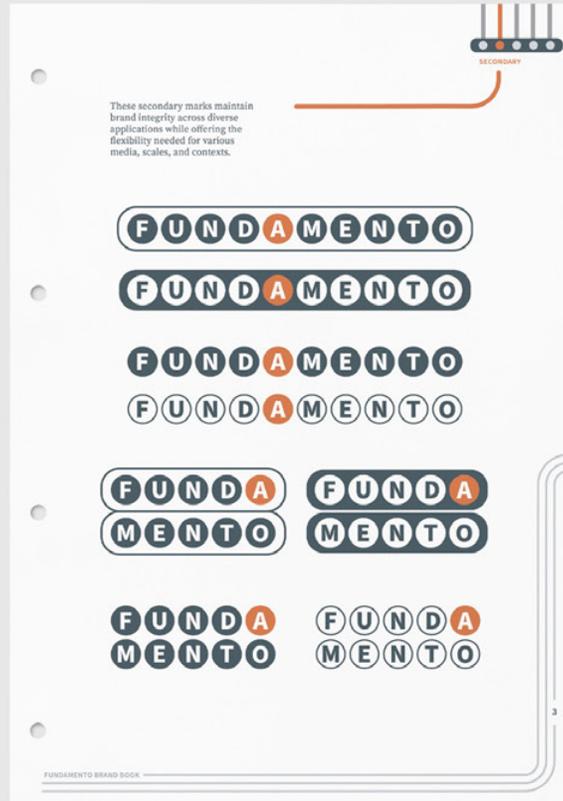
- Create readily available educational materials
- Create a guide to identify exact materials needed
- Create a library of multi-media resources

INSIGHTFUL GUIDE
POSITIONING

Crafted a distinctive brand identity to launch Fundamento's mission



PROCESS 03 BRANDING & VISUAL DESIGN



Designed integrated campaign materials to bring the brand to life



PROCESS
04 BUILD, TEST, SHIP





PROCESS

04 BUILD, TEST, SHIP





Delivered a consistent brand identity filling gaps in autism education support



KEY OUTCOME

Created unified brand toolkit for a mission-driven education support initiative, aimed at promoting autism awareness

KEY LESSON

Applied accessibility and sensory-friendly design principles for a neurodiverse audience



FUNDAMENTO



GLOBEFLEX



THIRTY-YEAR FLEX

Brand identity to celebrate enduring commitment

OBJECTIVE

To develop a narrative for a firm milestone by highlighting GlobeFlex Capital's longevity and outstanding client service

END PRODUCT

- Story and commemorative logo established for the duration of the celebration
- Logo was delivered within a four-week target

DELIVERABLES

Branding & Identity System (Logo Design)

Identified unique brand features and distilled information collected to produce three conceptual starting points

CURRENT LOGO



GLOBEFLEX

Global - outer circle
Flexibility in the industry - inner shape

CEO'S LOGO REQUEST

Elegant

Classic

Simple

SURVEY RESULTS

Highlight firm longevity and client service

01

Distinct responsive methods in investing and client service delivers results

02

Exceptional service central to longevity

03

Pillars of success: Research, investment style, and first-rate service

Iterated the commemorative logo through three review cycles to align with the CEO and Marketing Manager



SKETCHES



GLOBEFLEX



GLOBEFLEX



GLOBEFLEX

EXPLORATIONS

Prepared the final logo for maximum legibility across digital and print touchpoints

Client Version

Concept Exploration



GLOBEFLEX



GLOBEFLEX



PROCESS

04 BUILD, TEST, SHIP



Provided a visual solution that delivers a thoughtful nod to durability and client service

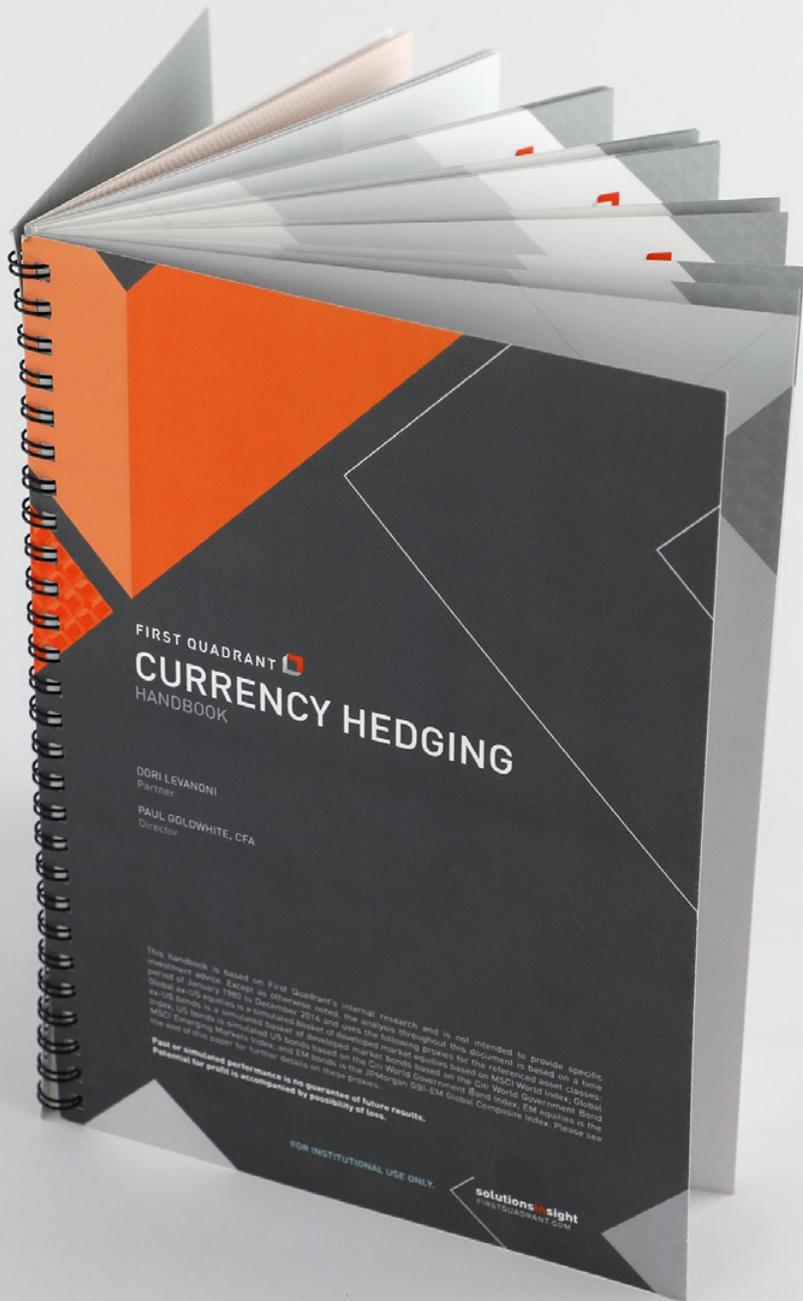
KEY OUTCOMES

- Developed final logo approved by the CEO, meeting the brief for an elegant, classic and simplified expression of the GlobeFlex brand
- The commemorative logo launched on schedule and was deployed across external materials to support the firm's anniversary communications

KEY LESSON

Collaborating with senior leadership emphasized the significance of balancing brand character with a clear narrative when designing for key milestone events





HOW TO HEDGE

Publication design to simplify the complex

OBJECTIVE

Internal team wanted to:

- Create an introductory guide to educate and bridge knowledge gaps
- Broaden prospect pool

END PRODUCT

- Handbook published in print and PDF within four-month target
- Distributed to interested clients and prospects. The handbook became a frequently requested marketing resource

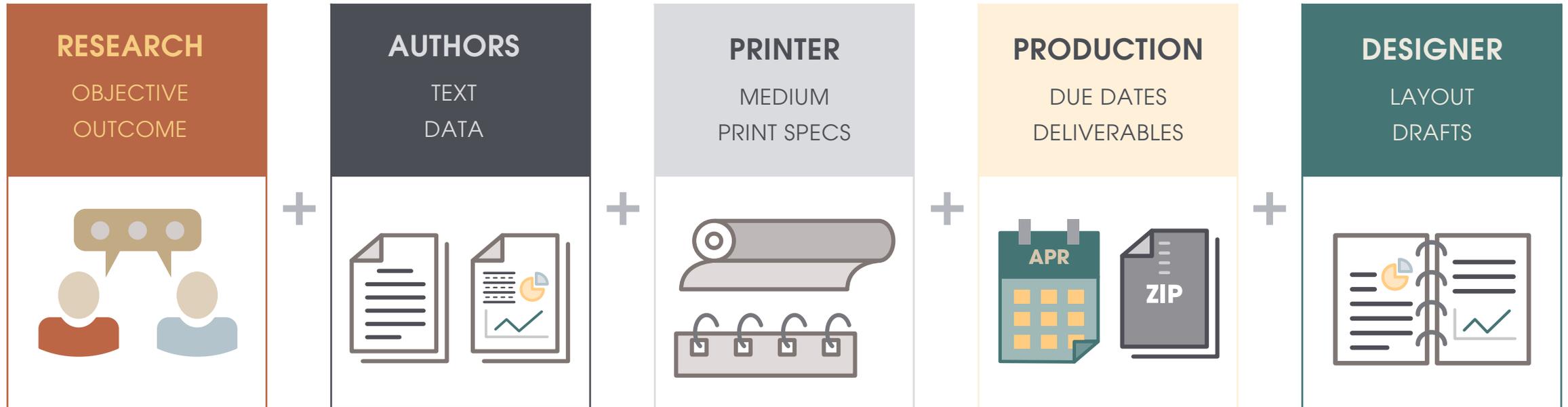
DELIVERABLES

Editorial Design

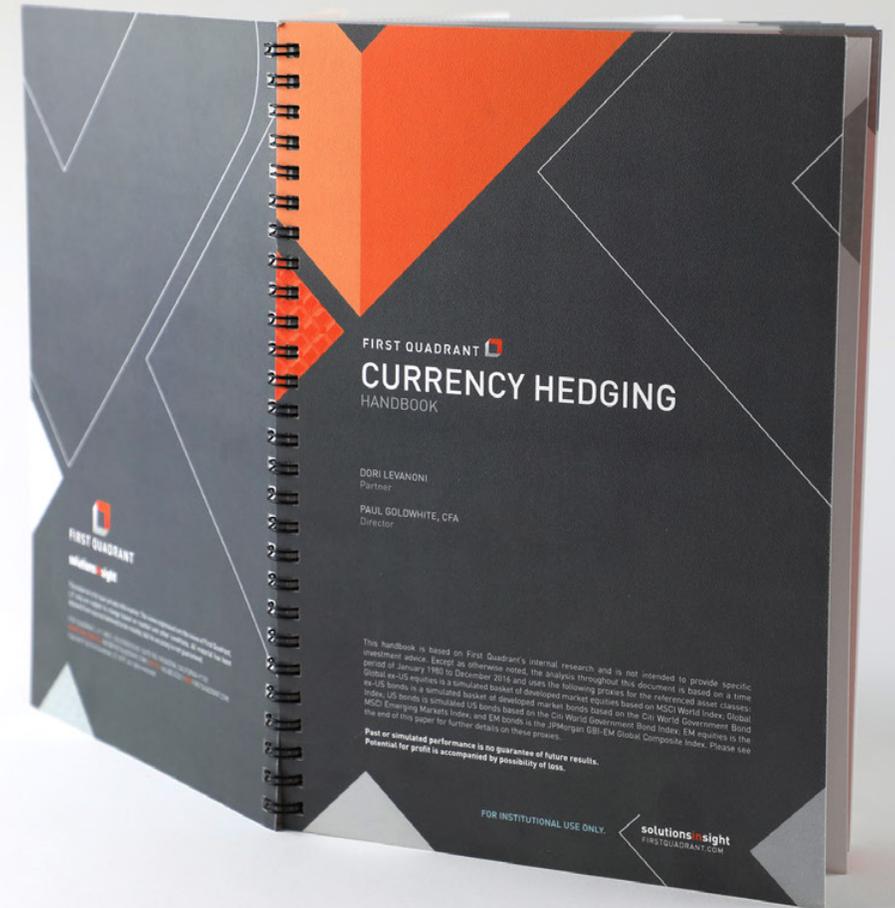
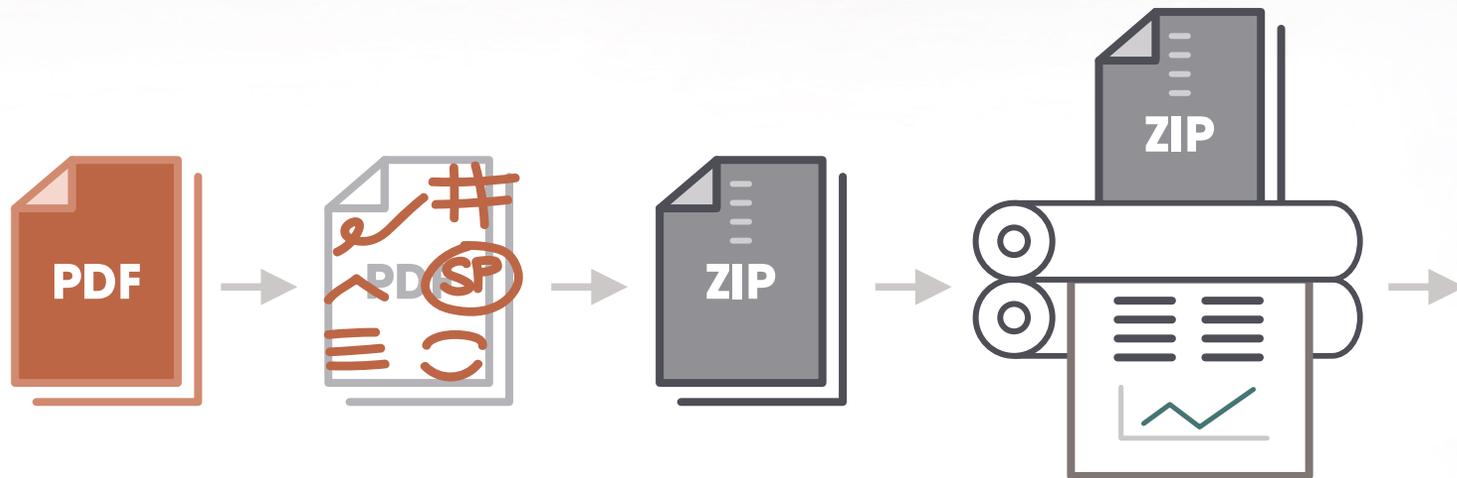
Branding & Marketing Campaigns

Project Management

Developed the production timeline by integrating objectives discovered through research, stakeholder requirements, and my own design process



I stewarded the entire production process, from editing to executing a seamless multi-format distribution campaign



EXECUTIVE SUMMARY

CHAPTER 1
Importance of having a currency policy
11 Why now?

CHAPTER 2
Establishing a currency policy benchmark
the optimal strategic hedge ratio
14 Global ex-US equities
14 Global ex-US bonds
25 Emerging markets
26 Other instruments

CHAPTER 3
Active/Passive Management
28 Participants in the foreign currency
28 Types of active management
29 Performance of currency
30 Constraints on active
34 Costs
37

CHAPTER 4
Implementation
39

TABLE OF CONTENTS

CHAPTER 1
Importance of having a currency policy

CHAPTER 2
Establishing a currency policy benchmark
the optimal strategic hedge ratio

CHAPTER 3
Active/Passive Management

CHAPTER 4
Implementation

TABLE 01 - COMPARING ASSET CLASS VOLATILITY UNHEDGED VERSUS FULLY HEDGED
(SEPTEMBER 2009 - DECEMBER 2016)

Asset Class	Standard Deviation	Unhedged	Fully Hedged*	Unhedged Minus Fully Hedged*	Unhedged Compared to Fully Hedged*
Global ex-US equities	12.2%	12.4%	2.6%	10%	100%
Global ex-US bonds	10.9%	4.9%	3.9%	10%	100%
EM equities	18.3%	11.7%	8.3%	10%	100%
EM bonds	10.9%	4.9%	3.9%	10%	100%
Global ex-US equities	12.2%	12.4%	2.6%	10%	100%
Global ex-US bonds	10.9%	4.9%	3.9%	10%	100%
EM equities	18.3%	11.7%	8.3%	10%	100%
EM bonds	10.9%	4.9%	3.9%	10%	100%

** Data are annualized standard deviation of monthly returns. *Unhedged and Fully Hedged are based on the same underlying assets. EM are the emerging market asset classes.*

TABLE 02 - UNIFORMITY OF GLOBAL EQUITY MANAGERS' 3-YEAR TRACK RECORDS

Period	Jan 2007 to Dec 2006	Jan 2007 to Dec 2011	Jan 2007 to Dec 2014	Average of 3 periods
Excess Return	6.1%	1.8%	0.8%	2.9%
Top 5	1.7%	8.2%	-0.2%	6.4%
Information Ratio	-0.2%	-1.2%	-1.9%	-1.3%
Median	3.2	0.4	0.3	0.4
Lower Quartile	0.5	-0.1	-0.1	0.2
Lower Quartile	0.0	-0.3	-0.4	-0.3

Managers: 129, 185, 183, 144

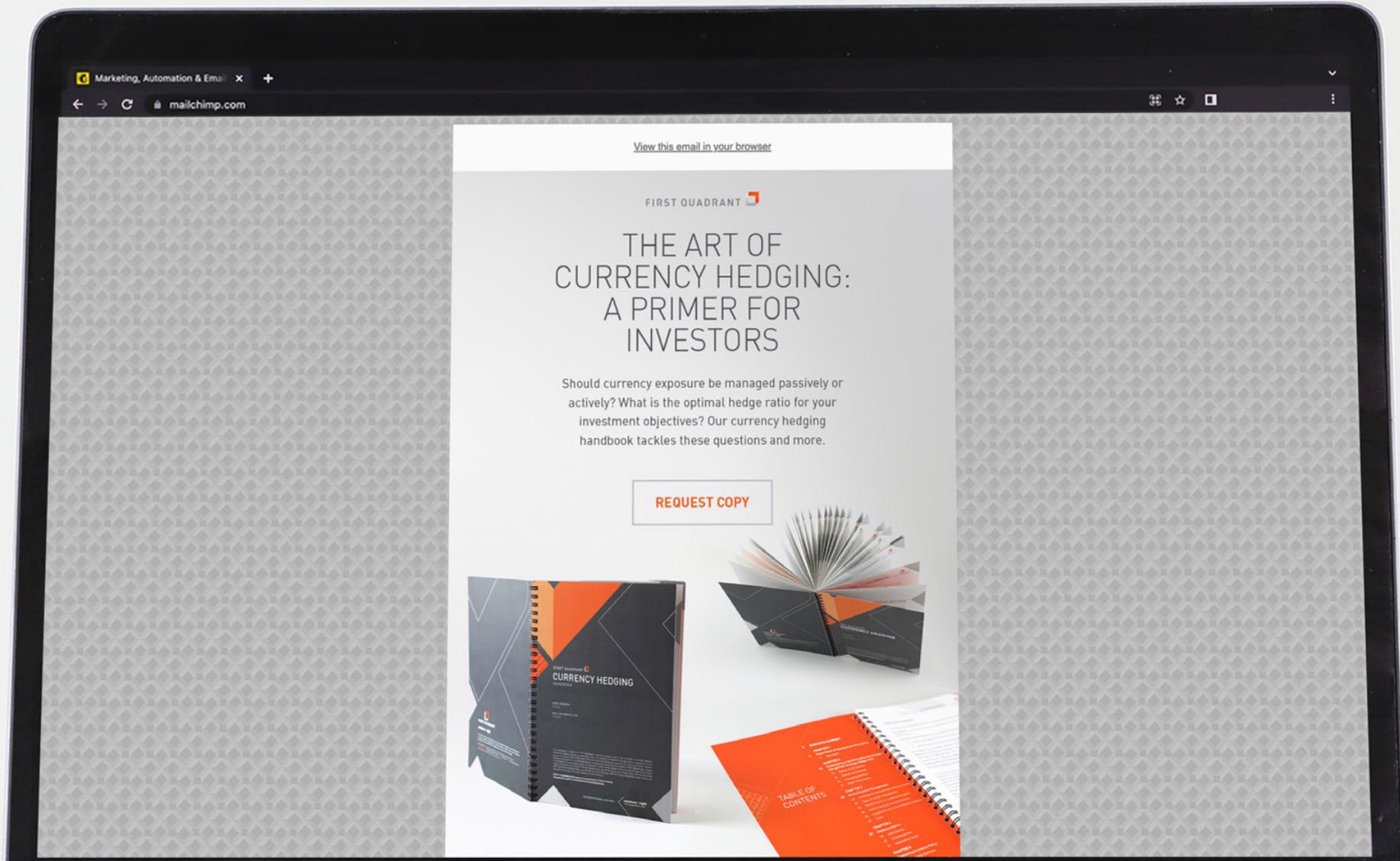
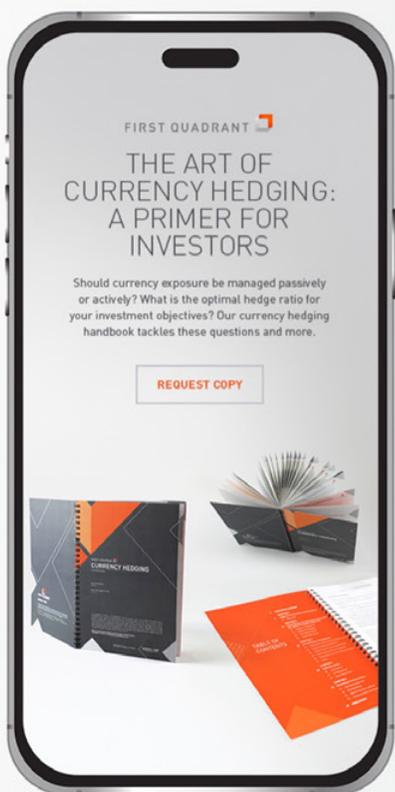
FIGURE 13 - TIMESERIES CHART OF CARRY, VALUE AND TREND
(SEPTEMBER 2009 - DECEMBER 2016)

TABLE 03 - NUMERICAL SUMMARY OF CARRY, VALUE AND TREND
(SEPTEMBER 2009 - DECEMBER 2016)

Measure	Carry	Value	Trend	Combination
Return	3.3%	2.9%	1.2%	2.2%
Standard Deviation	7.8%	9.1%	9.2%	4.4%
Information Ratio	0.4	0.3	0.3	0.4
Maximum Drawdown (12 Months)	-13.8%	-20.5%	-10.9%	-4.4%

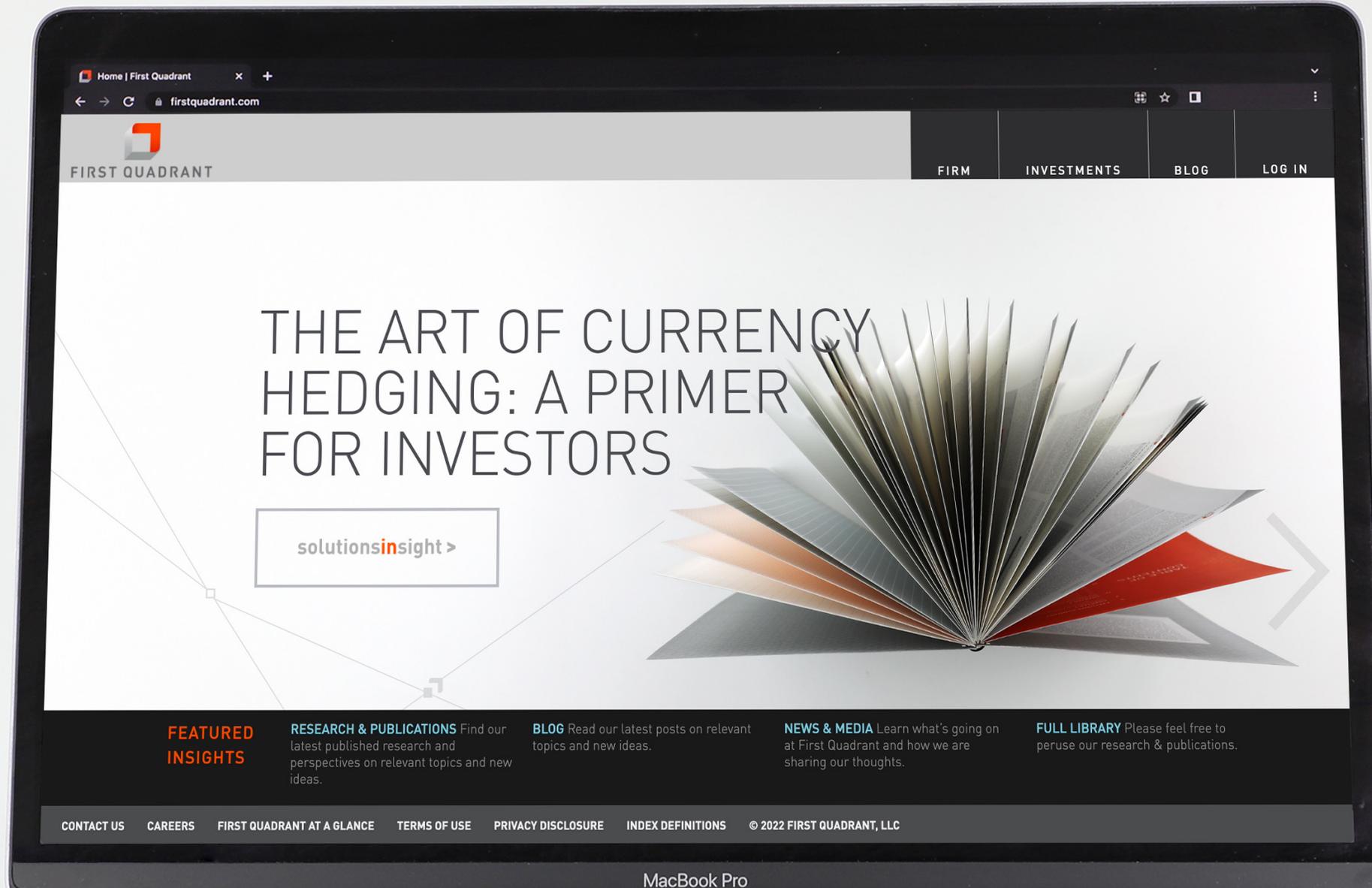
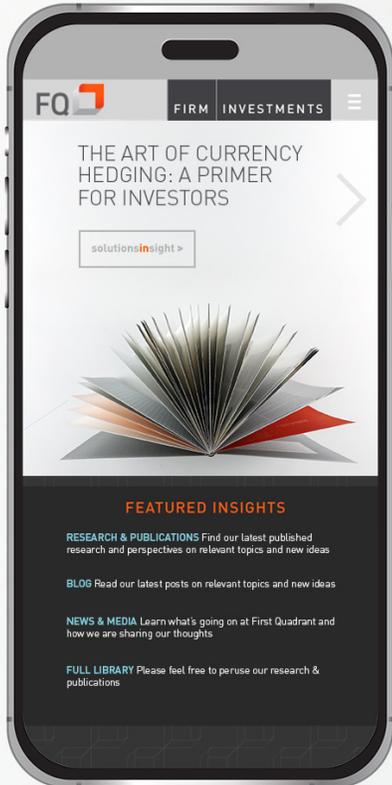


Mailchimp
Template
Mobile/Desktop



MacBook Pro

Website Ad
Mobile/Desktop



A purpose-driven product was the result of cross-functional collaboration and an adaptive creative process

KEY OUTCOME

Designed and delivered a 48-page handbook on schedule; distributed to all external-facing team members and established as the firm's standard educational resource for explaining Currency Hedging

KEY LESSON

Pivoting from a white paper to a handbook reinforced the importance of aligning format decisions with audience demand to maximize impact.



INSIGHT PLOT

Visual and experience design for a blog page

OBJECTIVE

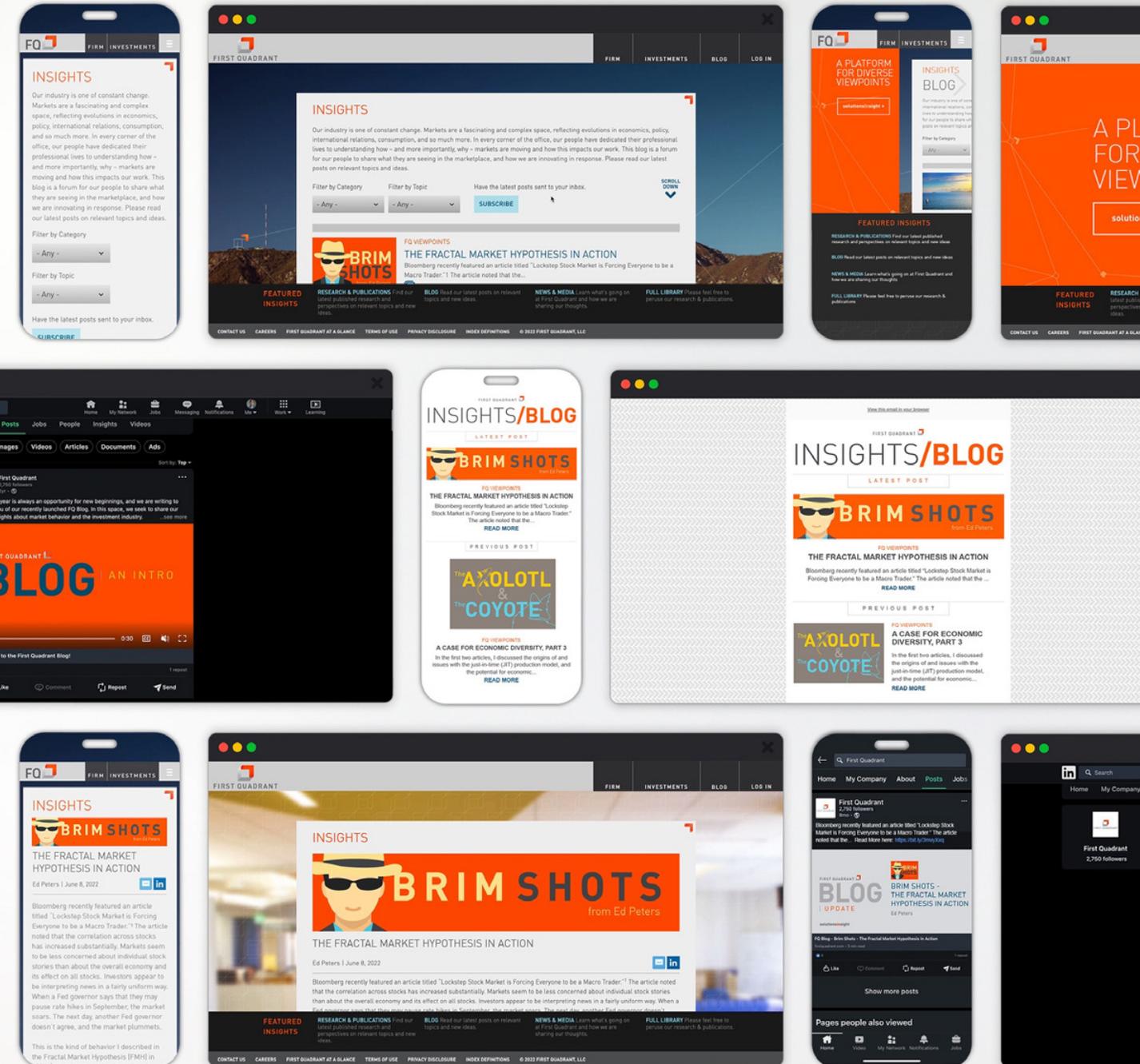
Create a space for employee perspectives beyond formal research publications

END PRODUCT

The blog went live in January 2021 after the project was initiated during the initial phase of the pandemic; executed blog launch activities on schedule

DELIVERABLES

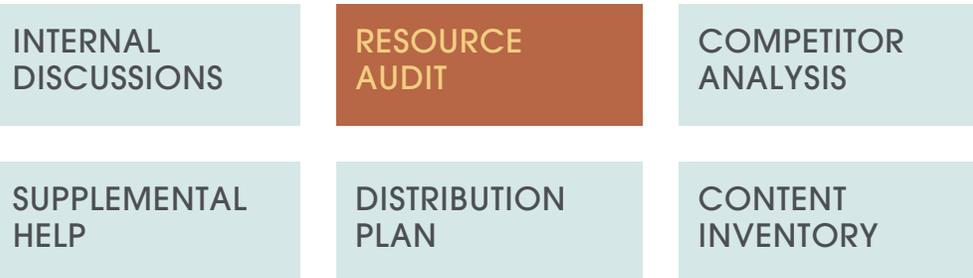
Experience Design
Motion Graphics
Branding & Marketing Campaigns
Content Strategy
Project Management



A website security issue discovered during Research modified the Strategy phase and adjusted the timeline

01

RESEARCH

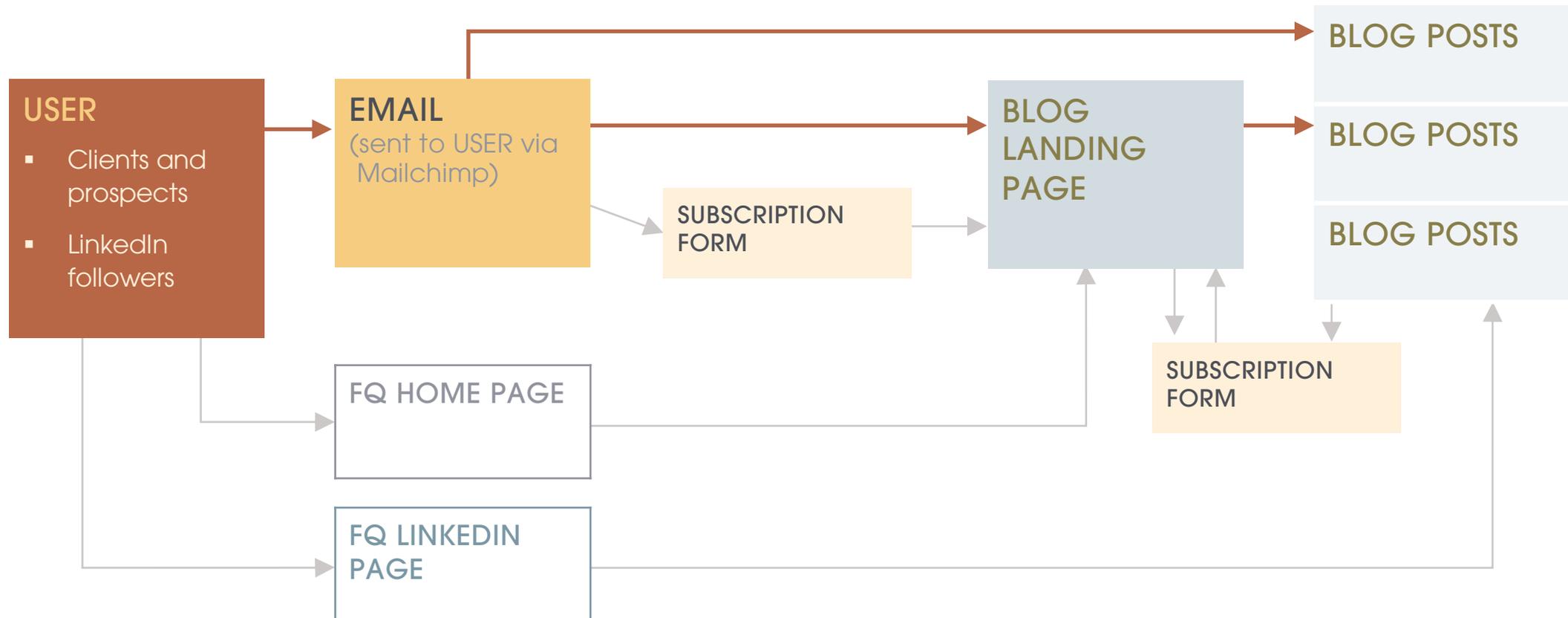


02

STRATEGY

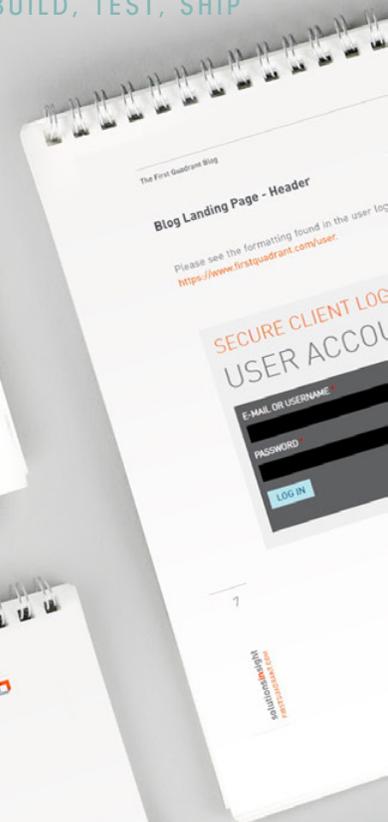
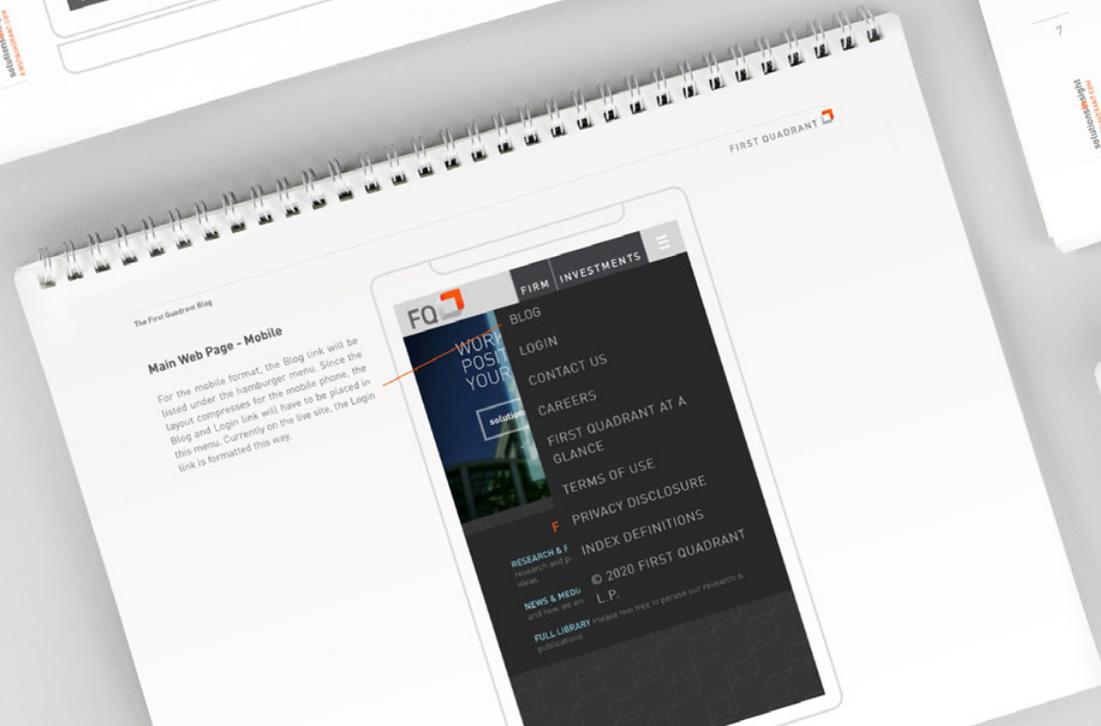
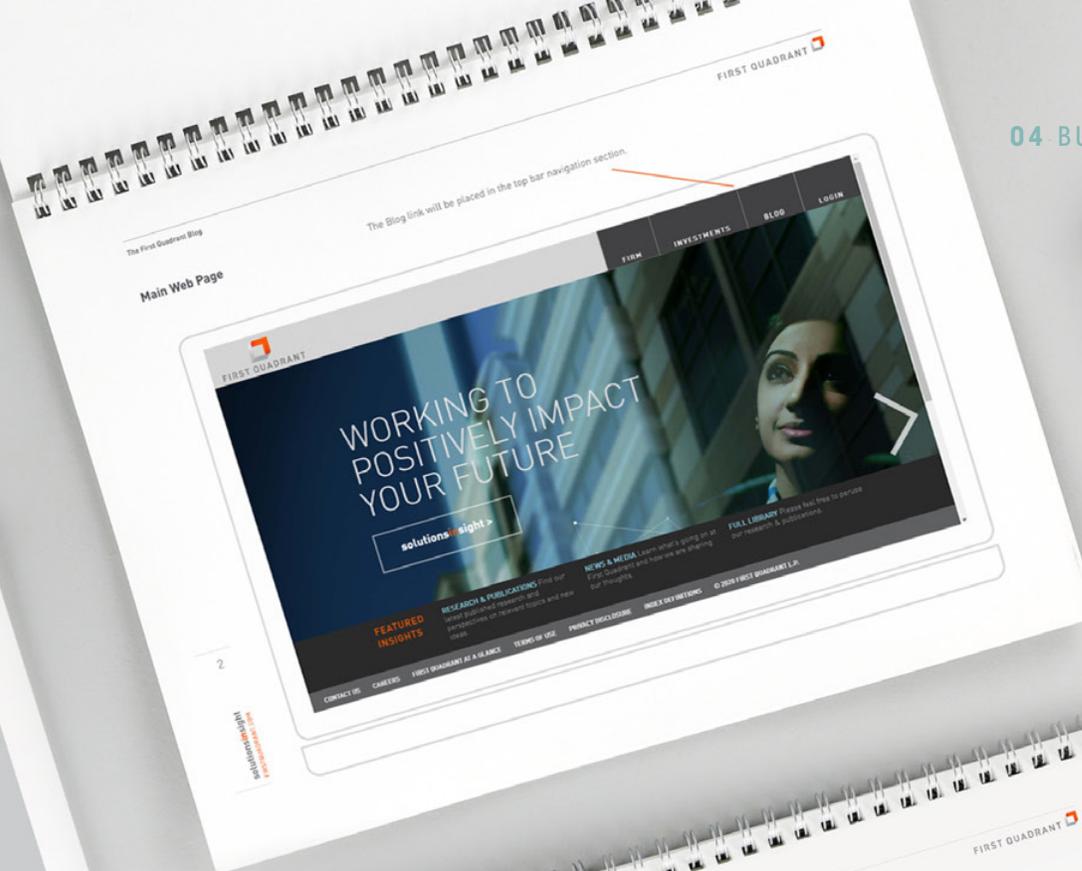


Outlined the user experience with the blog and determined initial target audience

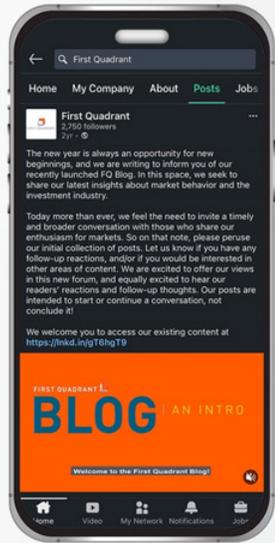


Provided the visual blueprint for the developers to actualize

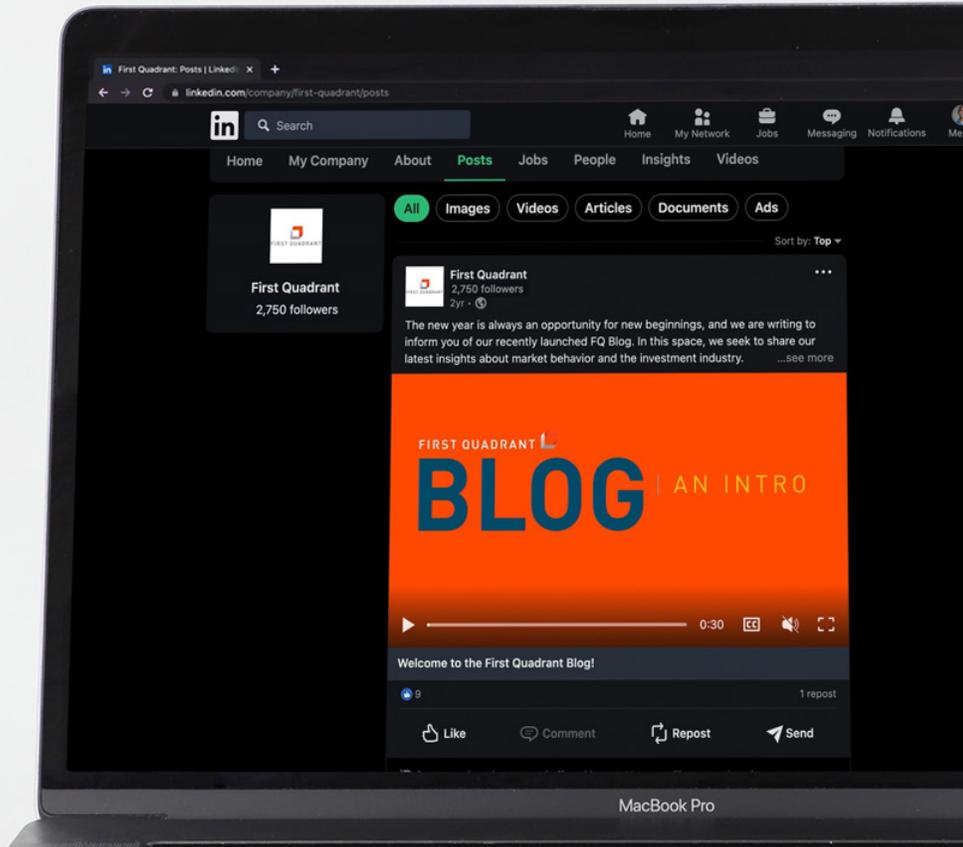
PROCESS
04 BUILD, TEST, SHIP



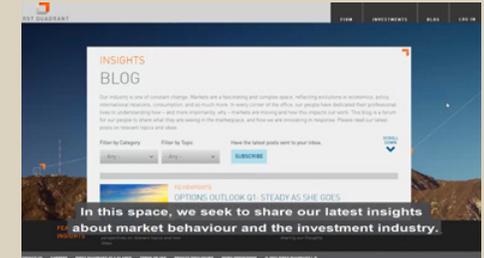
Managed the testing and validation of the blog site, the posting process, and execution of the pre- and post-launch activities



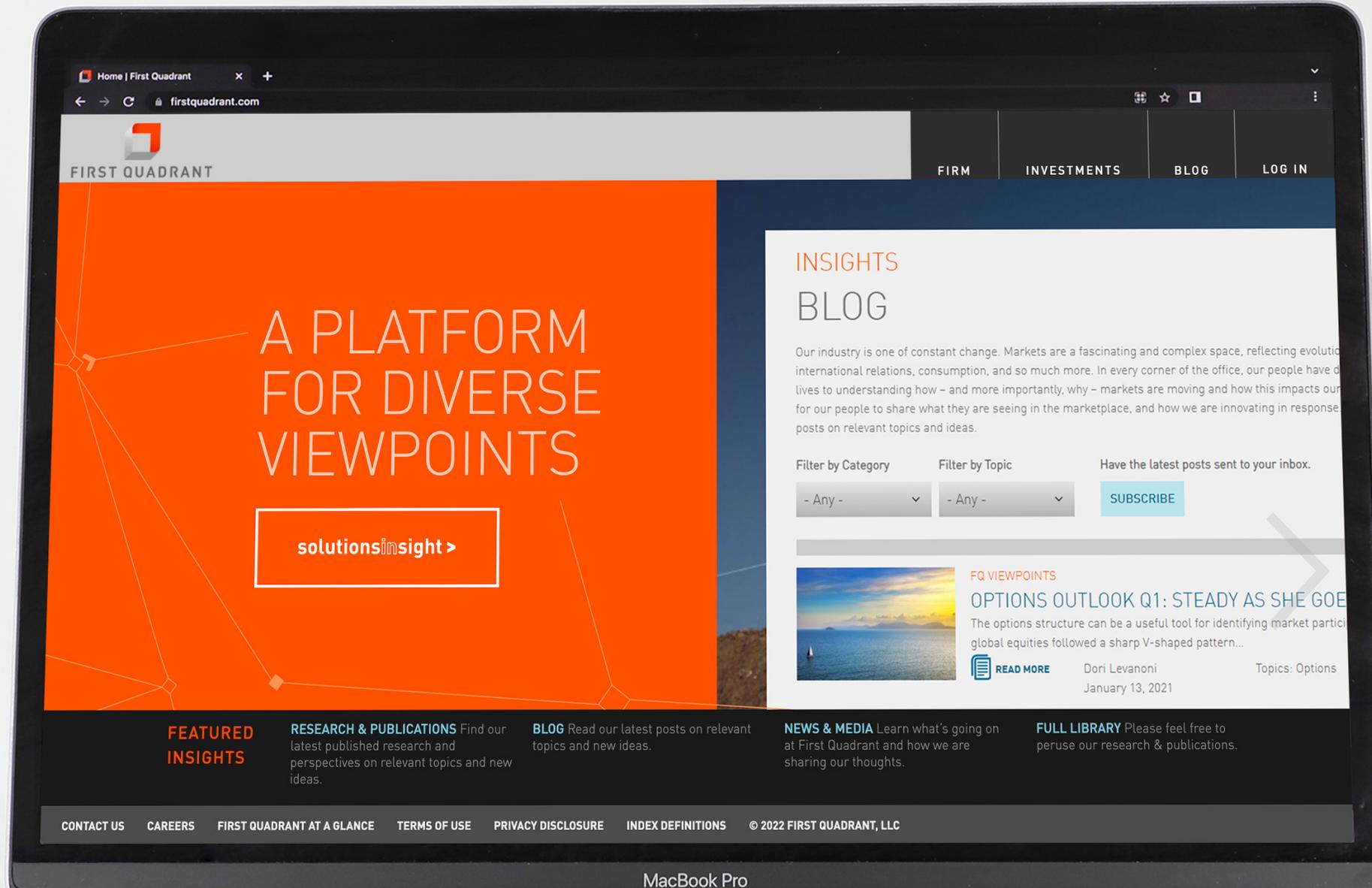
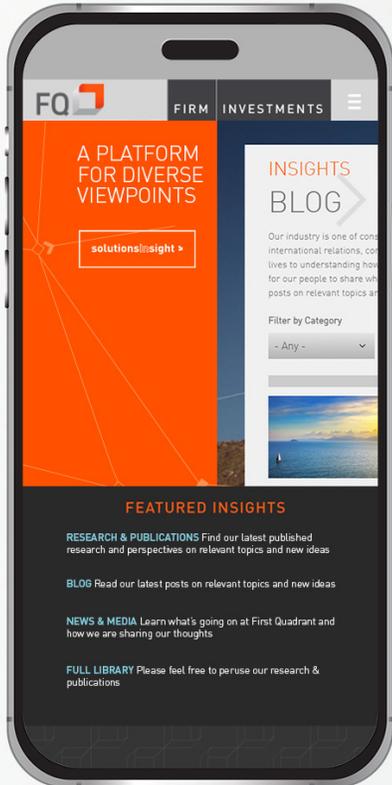
LinkedIn Post
Blog Intro Video



PROCESS
04 BUILD, TEST, SHIP



Website Ad
Mobile/Desktop



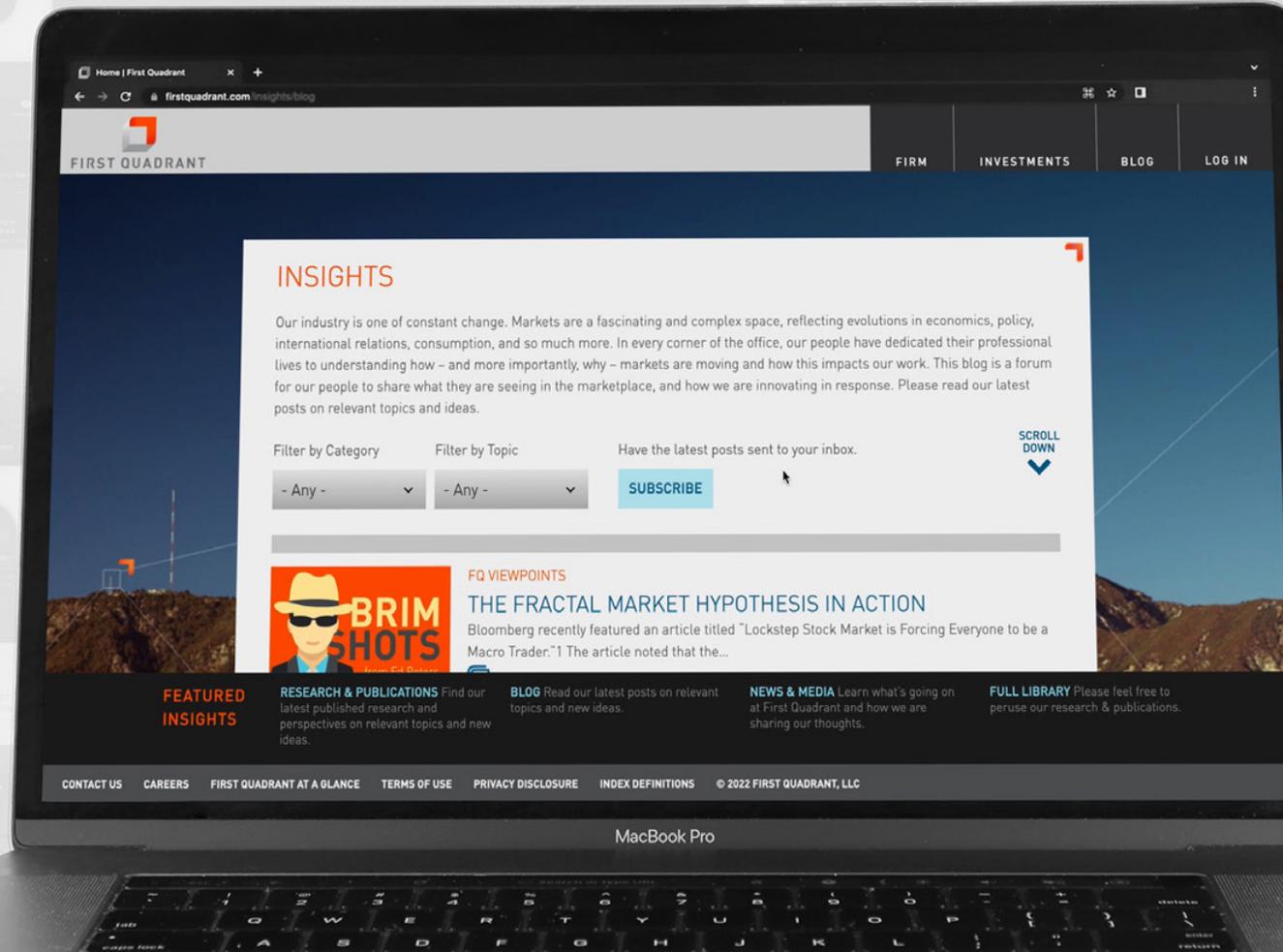
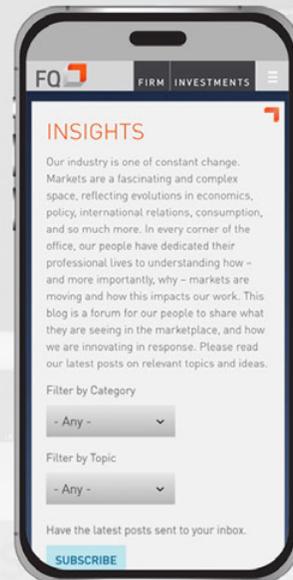
The blog page was launched after the project scope changed due to a critical website update

KEY OUTCOMES

- Established the firm's blog platform, creating a new channel to deliver ongoing thought leadership to clients and prospects
- Expanded the contributor base across multiple departments, diversifying the firm's editorial voice beyond the investment team

KEY LESSON

Effective stakeholder management drove project success during the pandemic, ensuring needs were met and expectations exceeded



THANK YOU!

Let's create designs that connects with your audience instantly

info@josecalm.com