

FUNDAMENTO

MAY 2026

FUNDA  
MENTO



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# JOSE CALM

PORTFOLIO

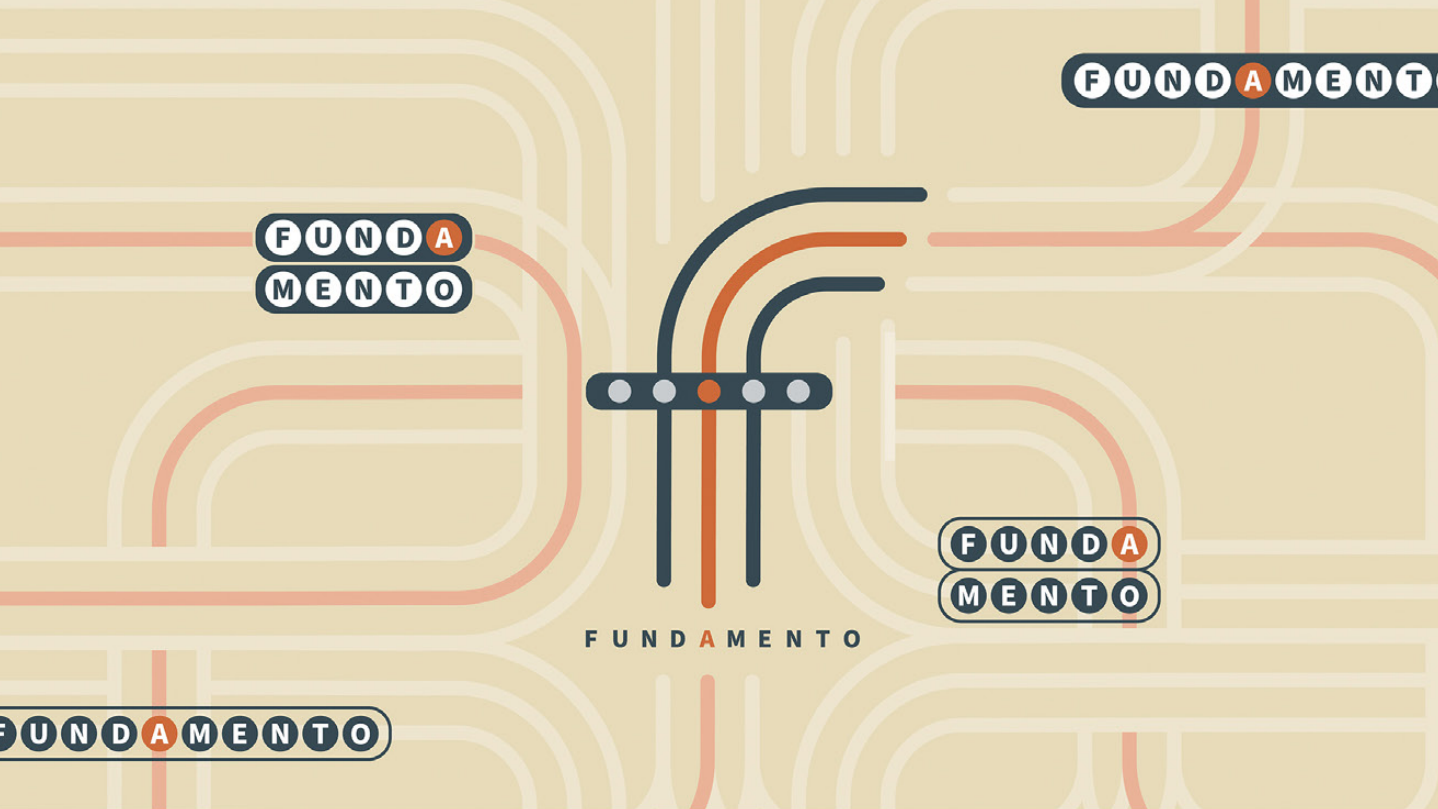
FUNDAMENTO



**BRAND SYSTEMS**  
**DIGITAL EXPERIENCES**  
**CAMPAIGNS**

JOSE CALM PORTFOLIO

# CALM DETAILS



**JOSE CALM** builds brand systems that translate complexity into clarity. 15+ years across branding, campaigns, and digital experiences—partnering cross-functionally to deliver visual work that holds over time.

01

RESEARCH

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02

STRATEGY

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03

DESIGN

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04

BUILD, TEST, SHIP

# PROCESS

**JOSE CALM**'s four-phase process turns complex ideas into clear, durable brand systems—grounded in research, shaped by strategy, realized through design, and refined through build, test, and ship.



**JOSE CALM** is a senior brand designer and art director with 15+ years of experience, including leading brand stewardship at First Quadrant, LLC, a global financial firm, and founding Calm Design LLC. He manages stakeholders, streamlines creative processes, and delivers high-impact projects on tight timelines. Jose holds a BA from Cal Poly Pomona.

BIO

## BRAND SYSTEMS

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

## DIGITAL EXPERIENCES

Experience Design  
Motion Graphics

## CAMPAIGNS

Brand & Marketing  
Campaigns  
Content Strategy  
Project Management

# DESIGN

## CAPABILITIES

**JOSE CALM** brings strategic creative stewardship—using intentional thinking to shape visually distinctive brand work

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?

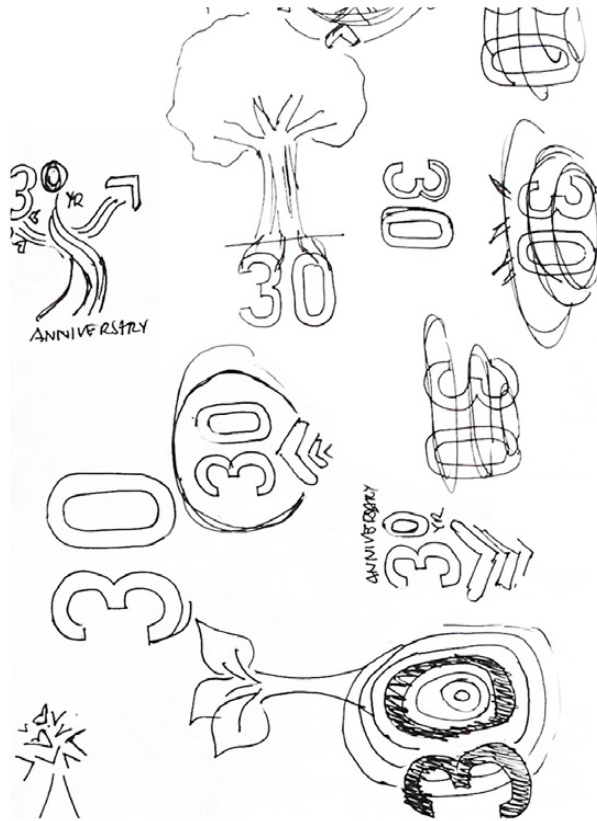
Anniversary Theme #2

~~idea generators~~  
~~creditors/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~~ 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 exploring  
 ③ this journey has created numerous paths that continue to accumulate through constant engagement of people & firm  
 - forming purpose - continued  
 → 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*

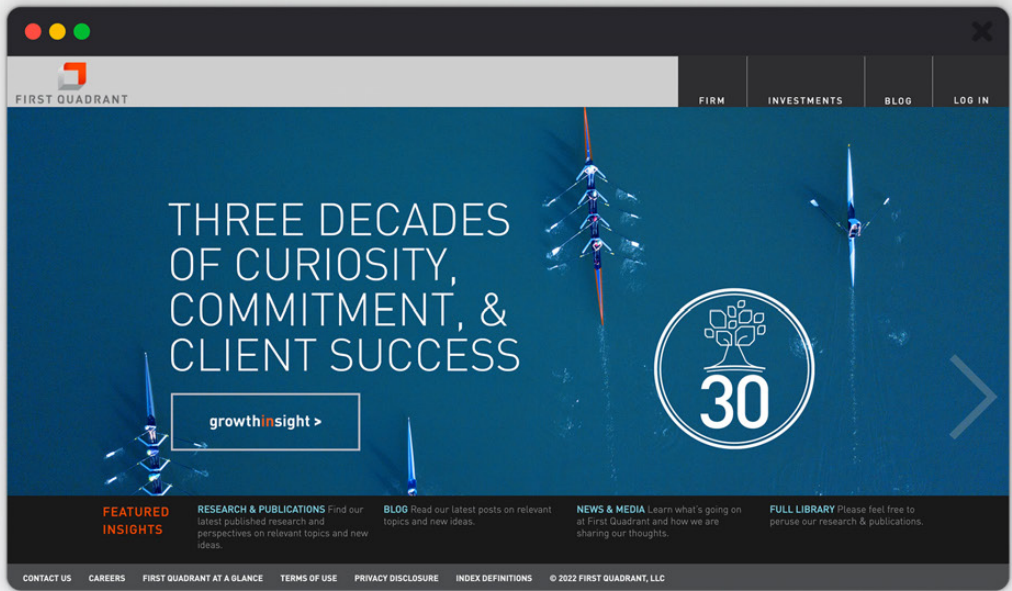
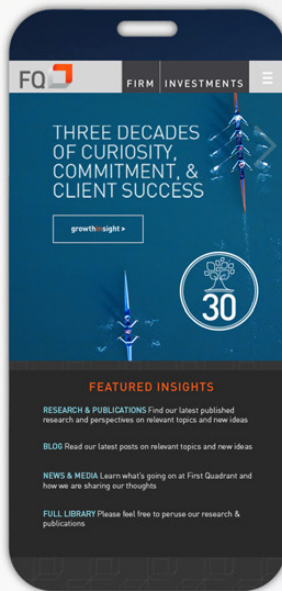
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PROCESS  
04 BUILD, TEST, SHIP



PROCESS  
04 BUILD, TEST, SHIP



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

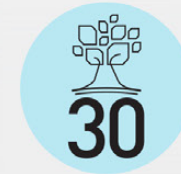
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KEY OUTCOMES

- 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

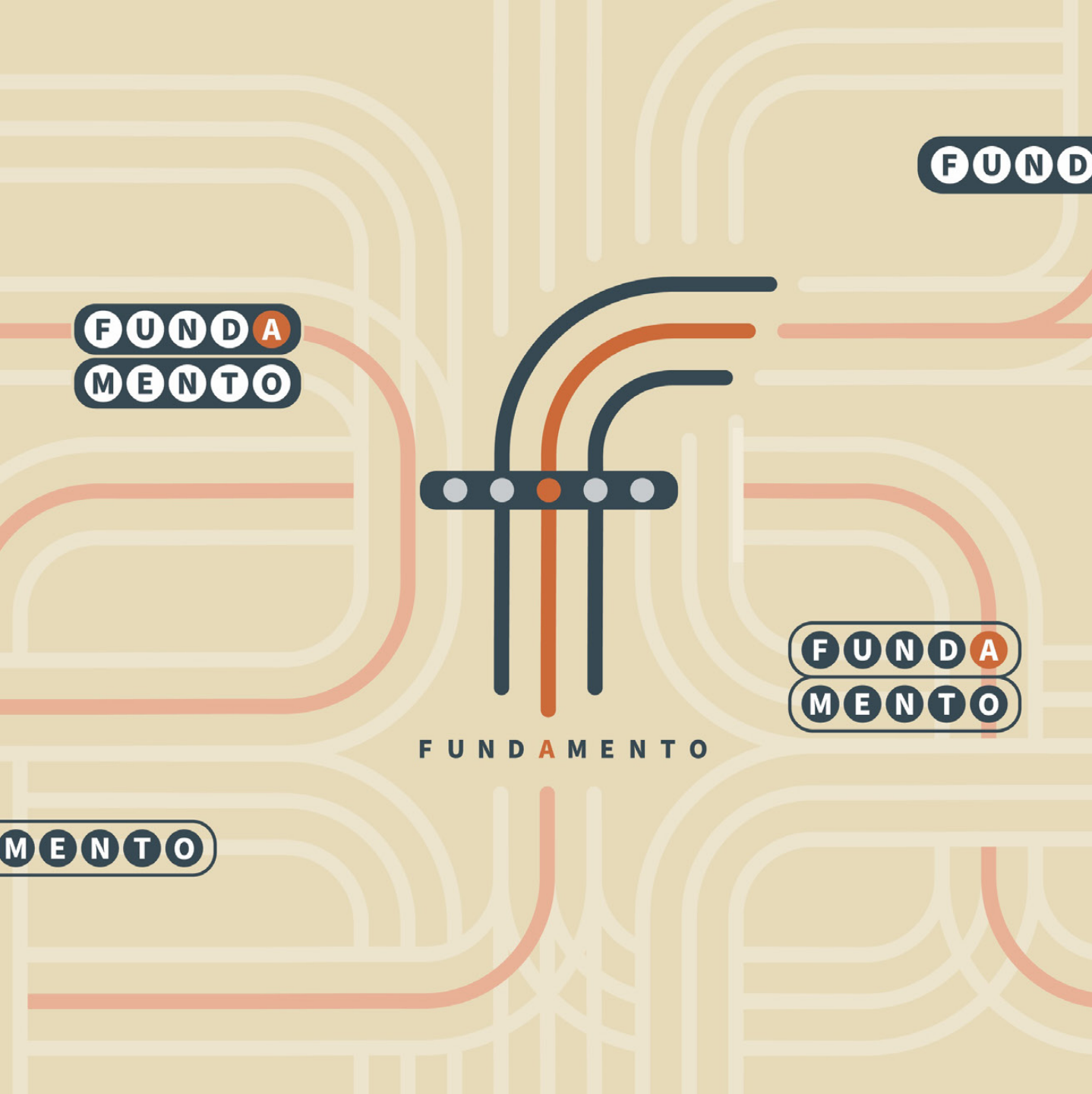


growthinsight



growthinsight





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# INSIGHTFUL GUIDE

Designing a brand concept for autism educational support

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## OBJECTIVE

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

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## END PRODUCT

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

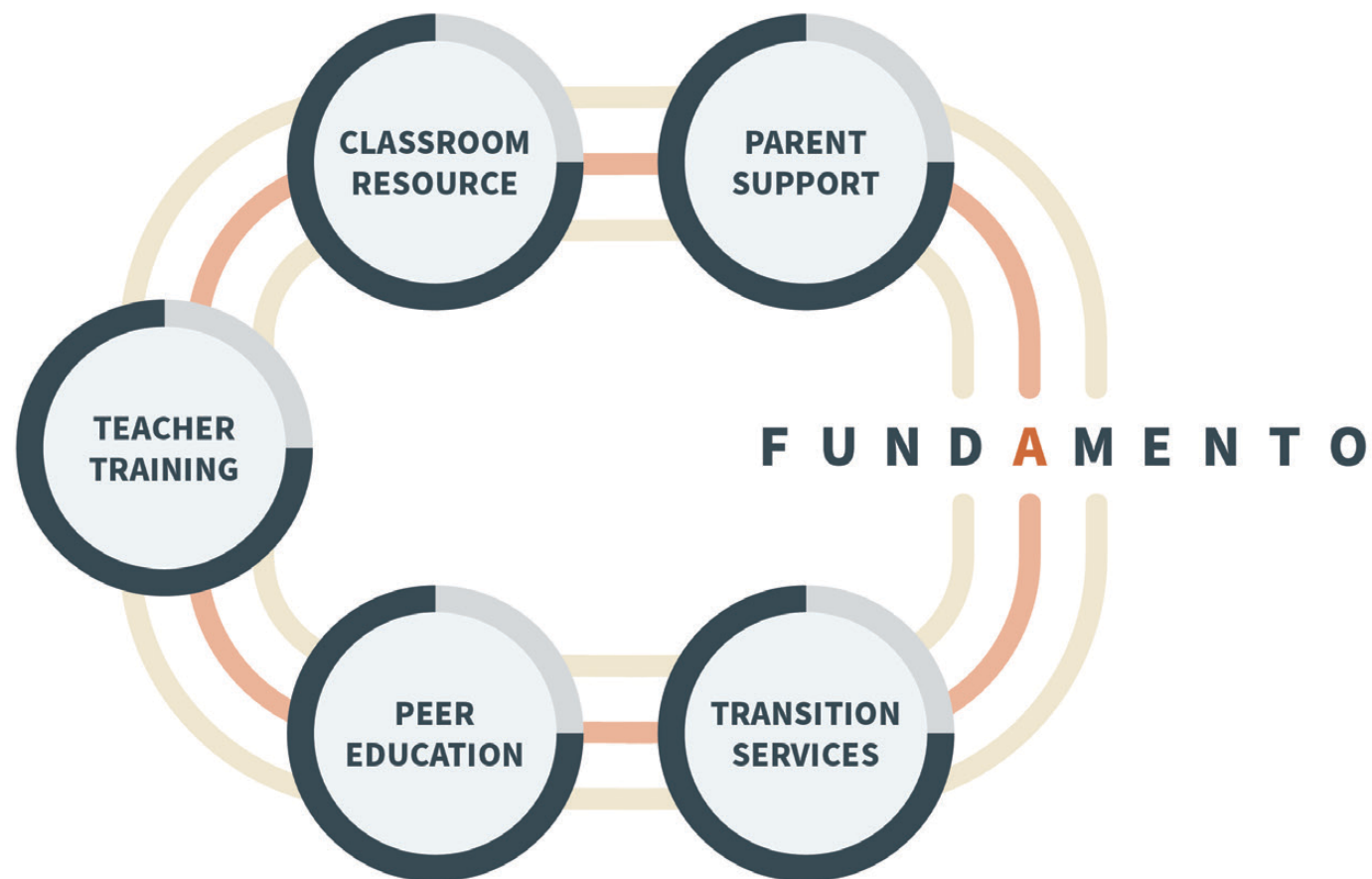
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## DELIVERABLES

Branding & Identity Design  
Experience Design  
Branding Campaign

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



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# Developed a strategic brand roadmap to guide visual execution

## A

### PURPOSE

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

## B

### PERSONALITY

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- User-friendly
- Knowledgeable
- Progressive

## C

### AUDIENCE

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

## D

### OPPORTUNITIES

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

**INSIGHTFUL GUIDE**  
POSITIONING



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

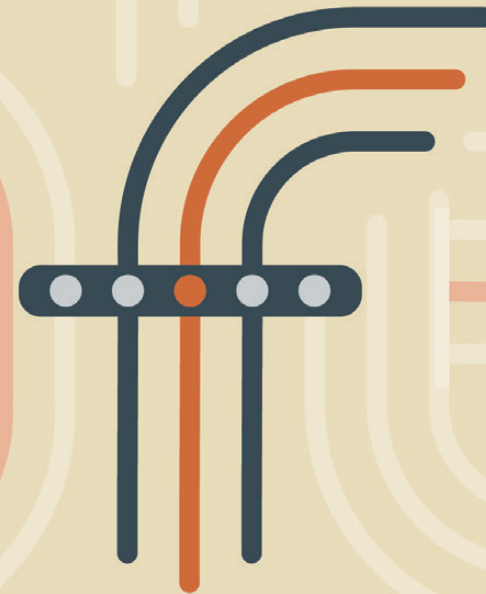


## KEY OUTCOME

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

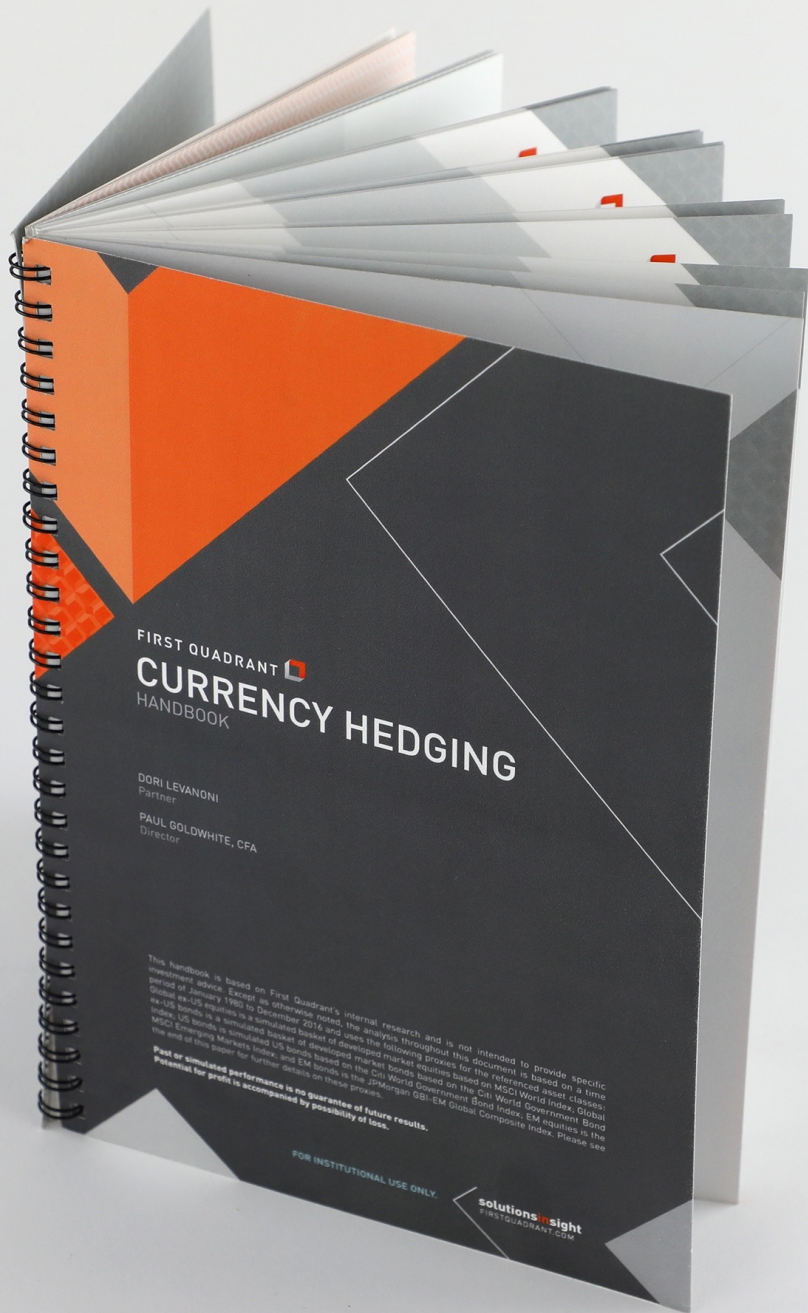
## KEY LESSON

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



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# HOW TO HEDGE

Publication design to simplify the complex

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## OBJECTIVE

Internal team wanted to:

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

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## 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

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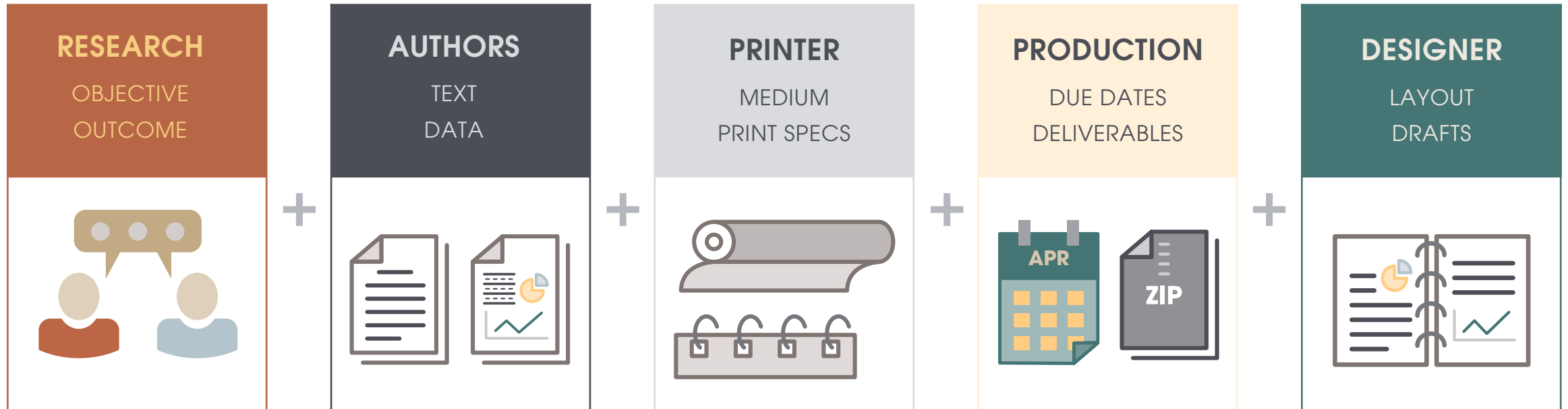
## DELIVERABLES

Editorial Design

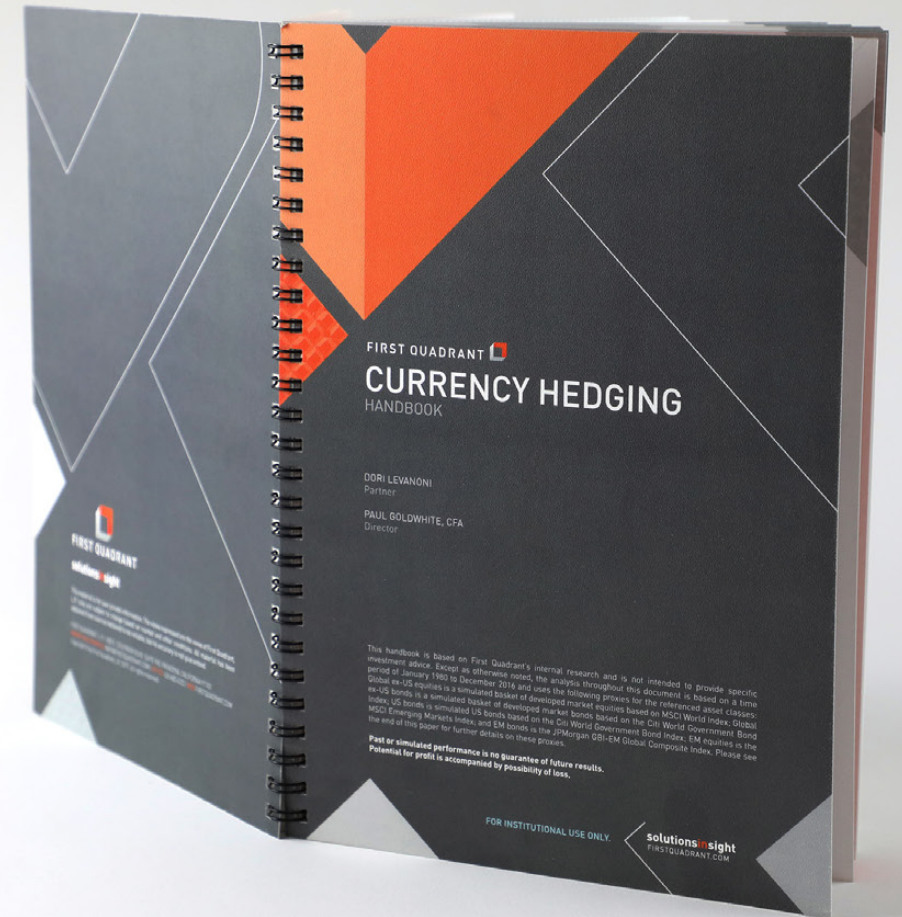
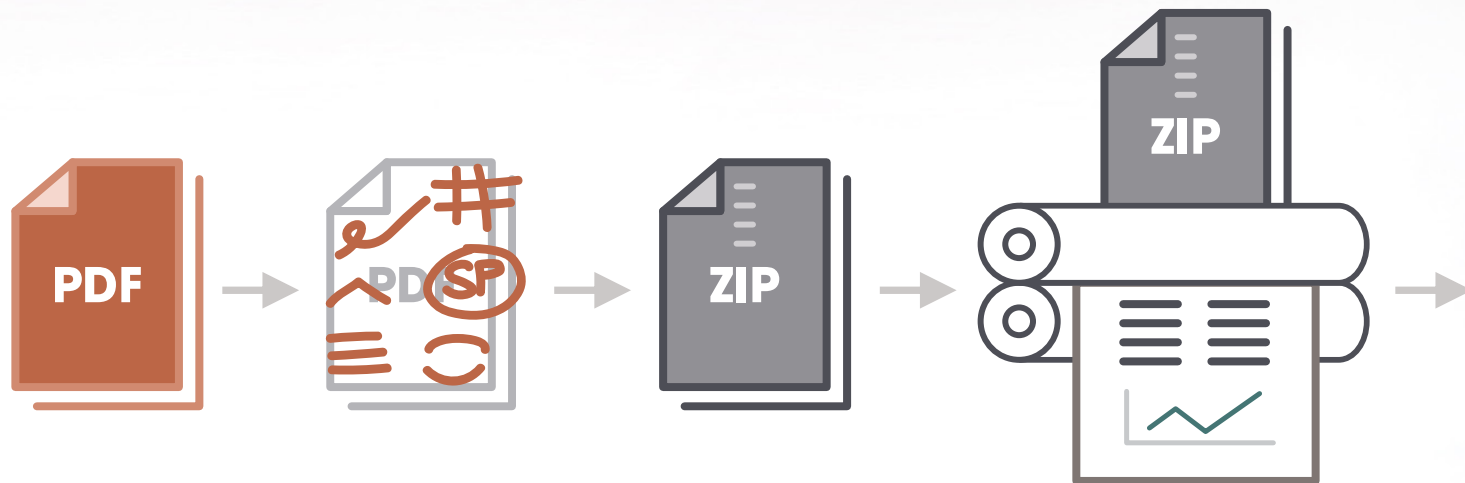
Branding & Marketing Campaigns

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**

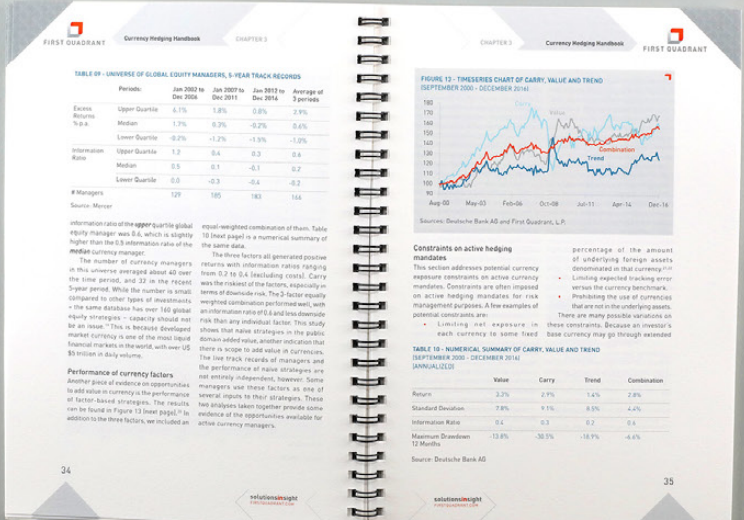
**CHAPTER 1**  
Importance of having a currency policy  
11 Why now?

**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

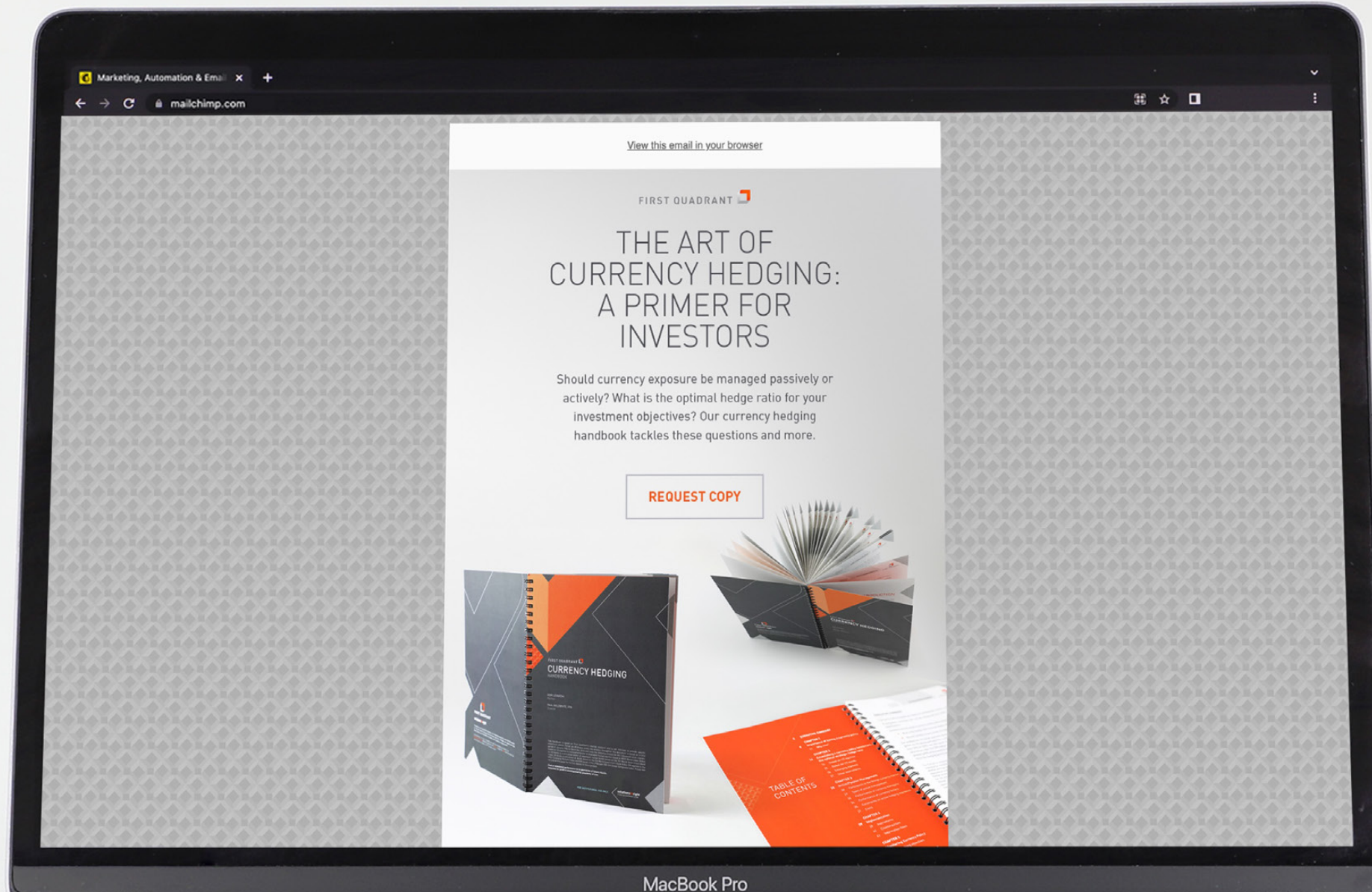
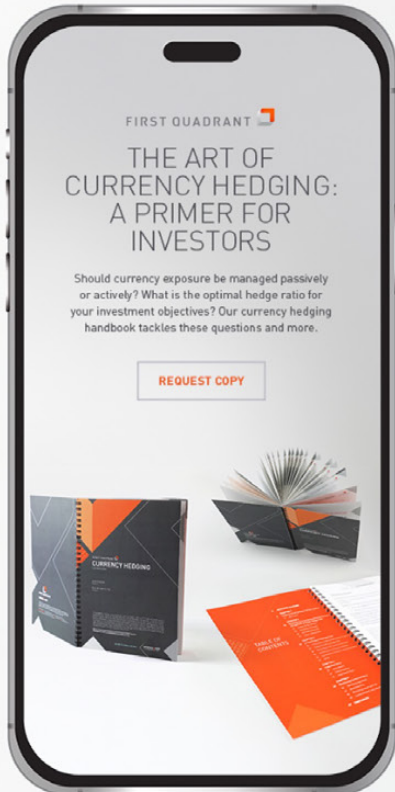
**CHAPTER 3**  
Active/Passive Management  
28 Participants in the foreign currency  
28 Types of active management  
29 Performance of currency  
30 Constraints on a  
34 Costs  
37

**CHAPTER 4**  
Implementation  
39

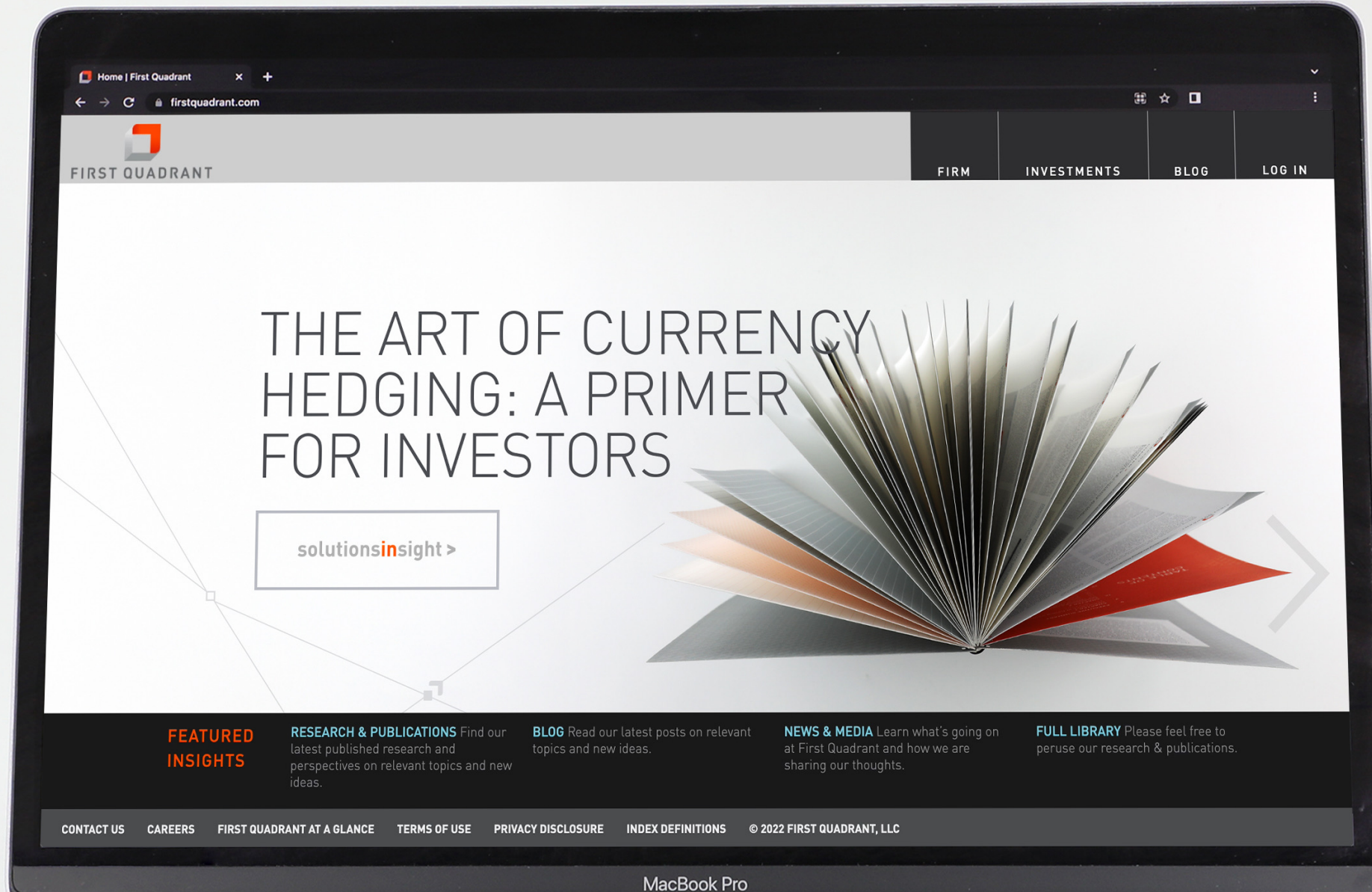
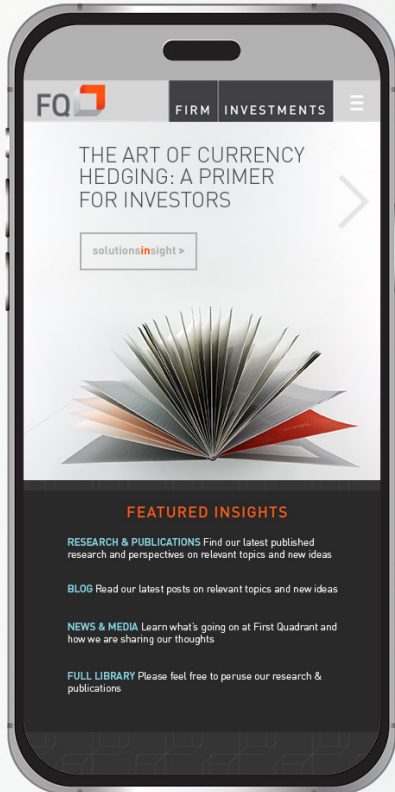
**TABLE OF CONTENTS**



Mailchimp  
Template  
*Mobile/Desktop*



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

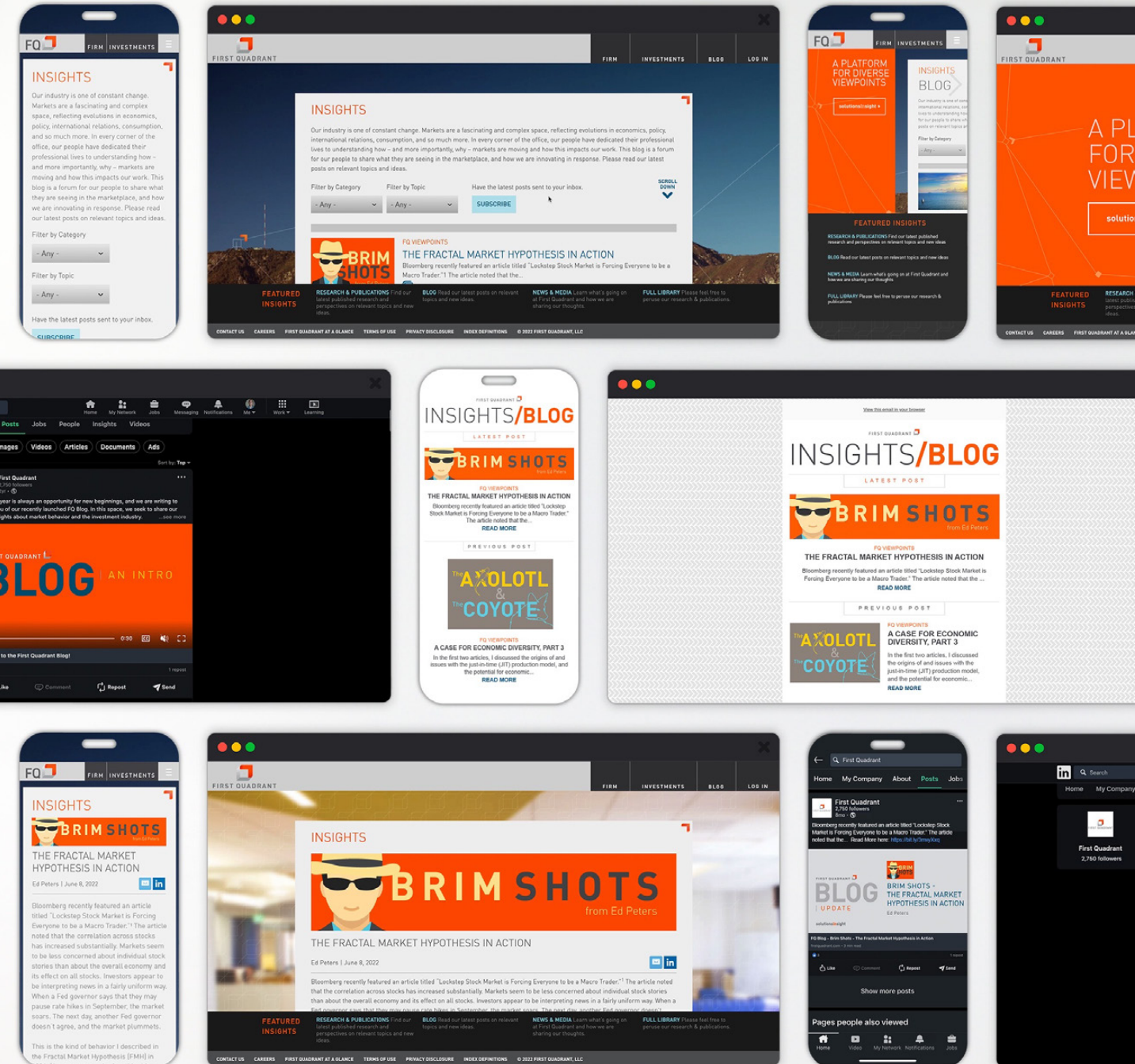
Create a space for employee perspectives beyond formal research publications

## 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



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

**01**

RESEARCH

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INTERNAL DISCUSSIONS

RESOURCE AUDIT

COMPETITOR ANALYSIS

SUPPLEMENTAL HELP

DISTRIBUTION PLAN

CONTENT INVENTORY

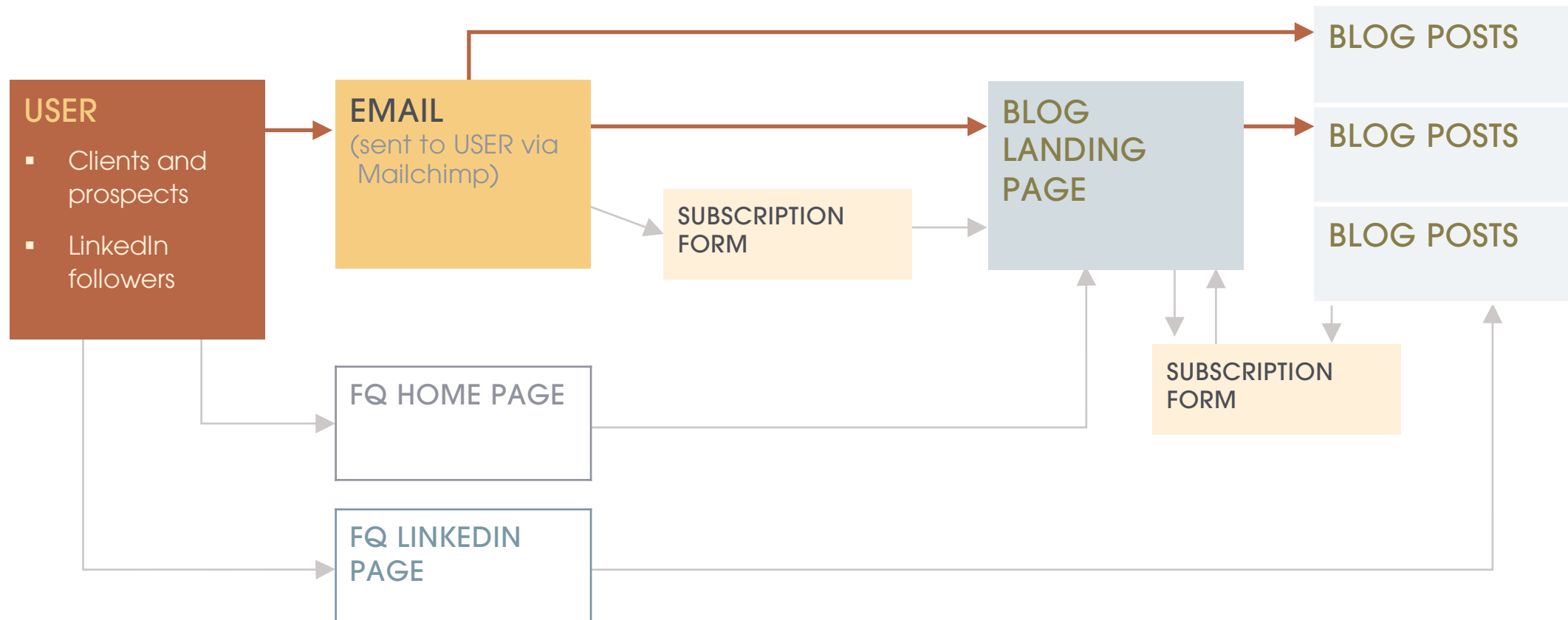
**02**

STRATEGY



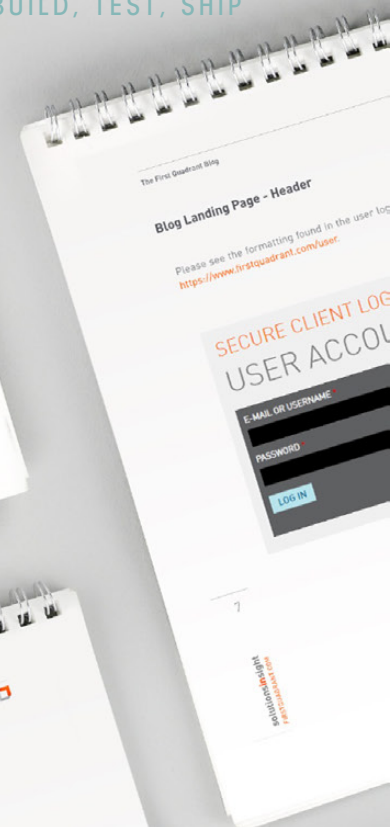
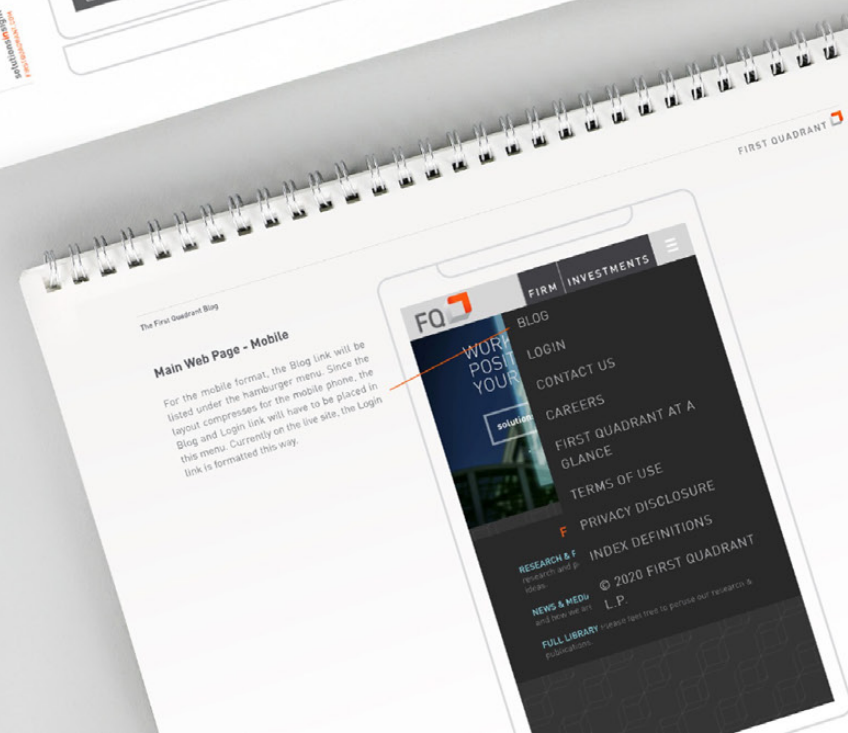
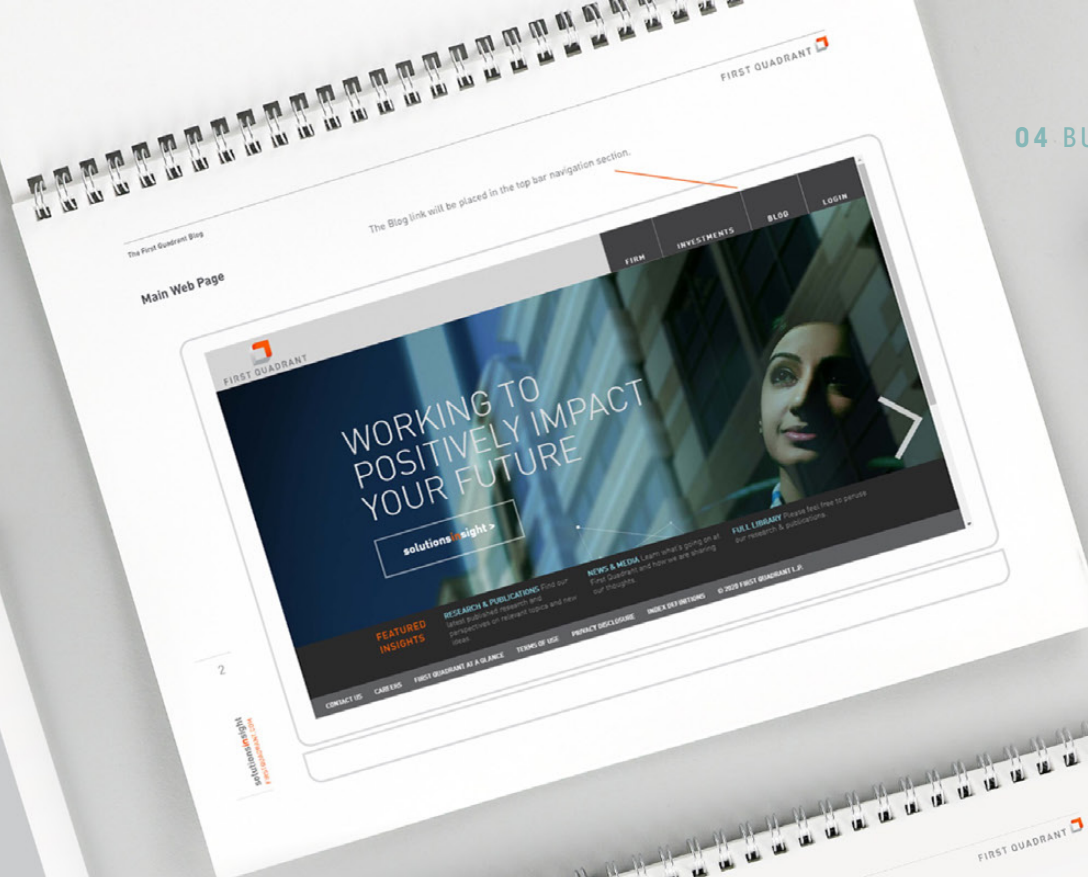
NECESSARY UPGRADES REQUIRED

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

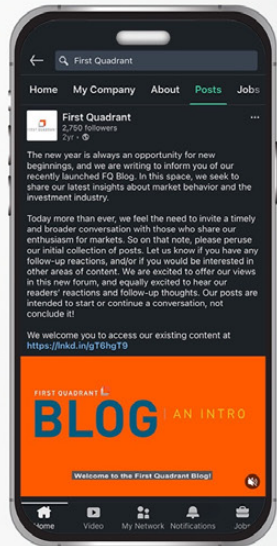


Provided the visual blueprint for the developers to actualize

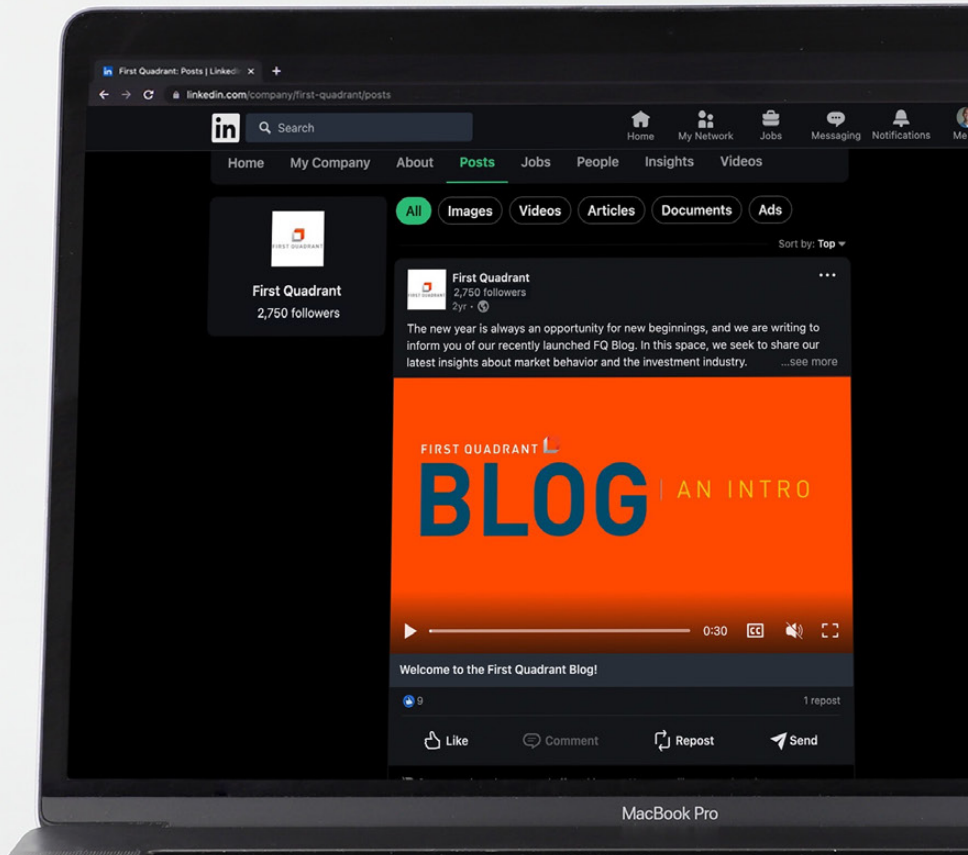
PROCESS  
04 BUILD, TEST, SHIP



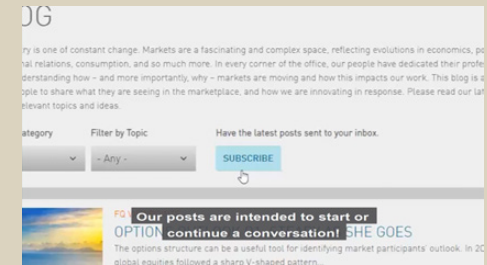
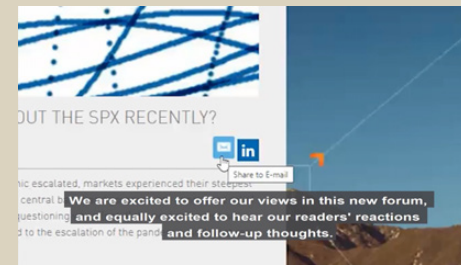
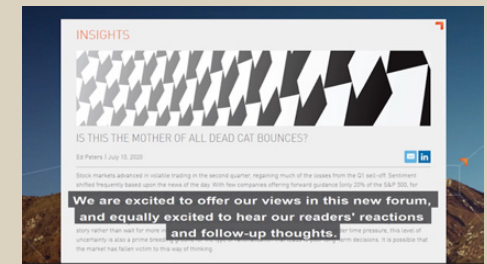
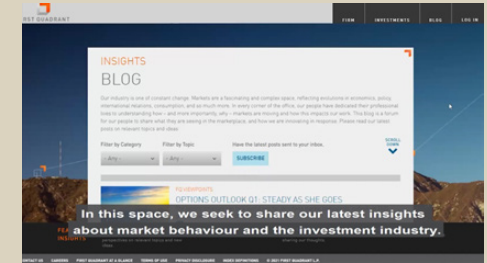
Managed the testing and validation of the blog site, the posting process, and execution of the pre- and post-launch activities



LinkedIn Post  
*Blog Intro Video*

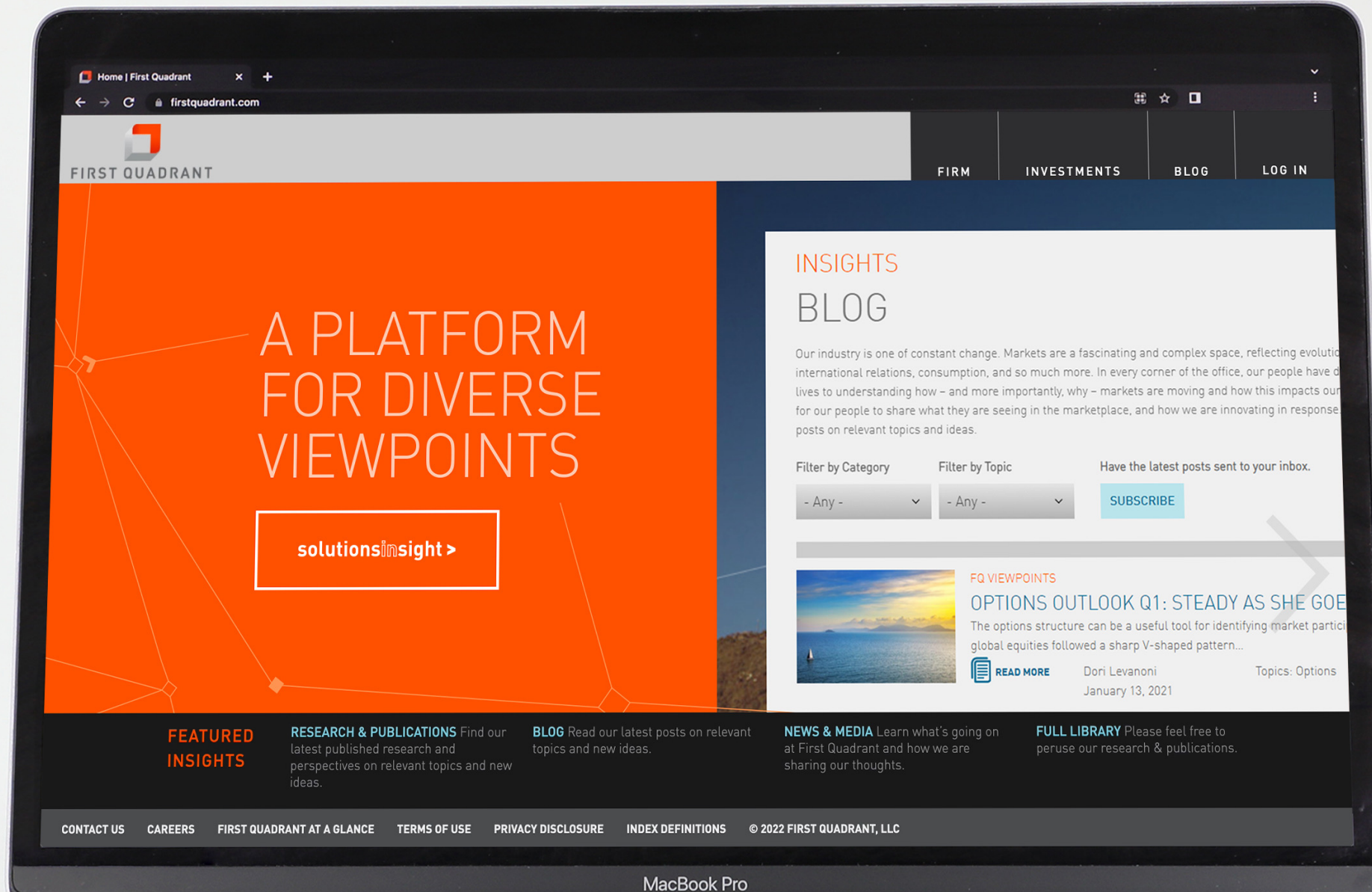
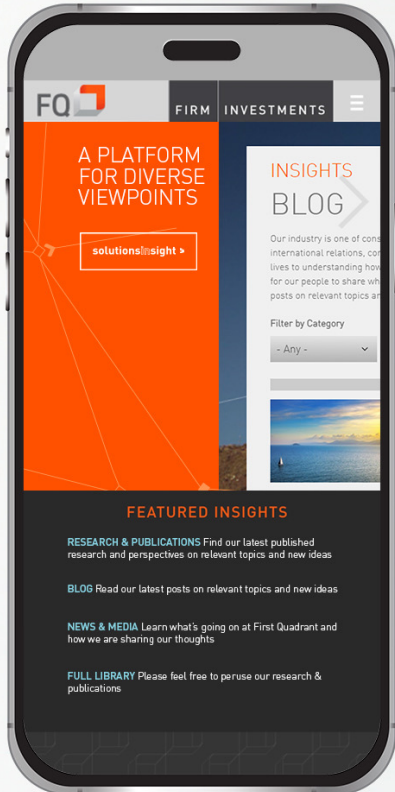


PROCESS  
04 BUILD, TEST, SHIP



VISIT US  
firstquadrant.com/insights/blog  
solutions@insight  
Please see our insights at  
firstquadrant.com/insights/blog

Website Ad  
*Mobile/Desktop*



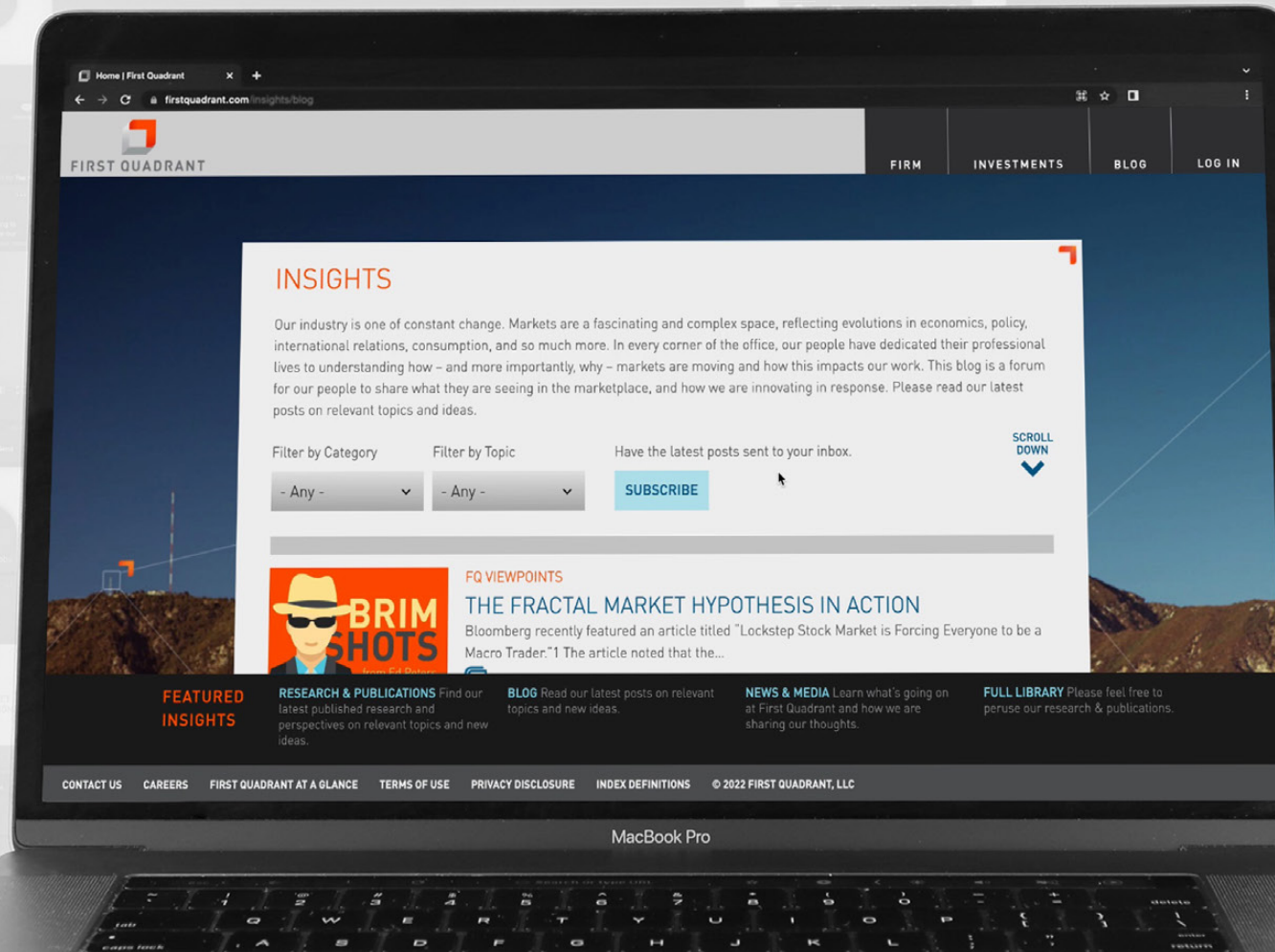
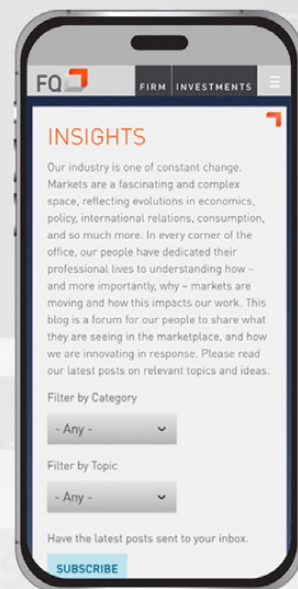
# The blog page was launched after the project scope changed due to a critical website update

## 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



GLOBEFLEX



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# THIRTY-YEAR FLEX

Brand identity to celebrate enduring commitment

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## OBJECTIVE

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

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## END PRODUCT

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

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## 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

EXPLORATIONS



GLOBEFLEX

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



# THANK YOU!

Let's create designs that connects with your audience instantly

[info@josecalm.com](mailto:info@josecalm.com)