OPTIMAL BLUE CORPORATE BRAND

GUIDELINES | AUGUST 2025

OPTIMALBLUE™
MODERN. PROVEN.

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CONTACT

For any questions or concerns regarding our brand or guidelines, please contact the marketing department or email **Marketing@OptimalBlue.com**.

ABOUT US

Optimal Blue is the leading provider of capital markets technology for the mortgage industry. As the only end-to-end platform that bridges the primary and secondary mortgage markets, we help lenders of all sizes operate more efficiently, manage risk more effectively, and maximize profitability for every loan transaction.

With over 20 years of experience and the largest market share in key capital markets segments, Optimal Blue is a trusted partner to lenders nationwide. Our platform powers over a third of mortgages priced and locked in the U.S. and supports nearly 40% of loans sold into the secondary market.

Our technology is built for scale and speed – cloud-native, API-first, and powered by automation, AI, and real-time data. We offer a fully integrated suite of solutions, including product, pricing, and eligibility, hedging and trading, compliance automation, MSR valuation, and data and analytics. With 70+ certified integration partners and a network that spans the mortgage ecosystem, we enable seamless connectivity and operational agility.

At Optimal Blue, we are committed to delivering measurable value. Our clients benefit from continuous innovation, no-cost enhancements, intuitive user experiences, and actionable insights that drive real ROI. Optimal Blue delivers the modern technology, expertise, and proven results that lenders need to navigate market volatility and scale for growth.

BOILERPLATE

The Optimal Blue boilerplate should be used where a concise, authoritative summary of the company is needed, including for press releases, media kits, and public-facing announcements. Always use the most current version and avoid modifying the language to maintain brand consistency.

> Optimal Blue powers profitability across the mortgage capital markets ecosystem. As the industry's only end-to-end capital markets platform, our technology, data, and integrations bridge the primary and secondary markets to help lenders of all sizes maximize performance – from pricing accuracy to margin protection and every step in between. Backed by over 20 years of proven expertise, our modern, cloud-native technology delivers the real-time automation, actionable data, and seamless connectivity lenders need to navigate market volatility and scale for growth. To learn more about how Optimal Blue delivers measurable ROI, visit **OptimalBlue.com**.

COMPANY DESCRIPTIONS

FULL-LENGTH DESCRIPTION (GENERAL – 90 WORDS, 650 CHARACTERS)

Optimal Blue is the modern, proven engine behind lender profitability. As the only end-to-end capital markets platform bridging primary and secondary mortgage markets, we help lenders operate efficiently, manage risk, and maximize performance on every loan. Our cloud-native, API-first platform is powered by automation, generative AI, and real-time data. With over 20 years of experience and leading market share, we deliver measurable ROI through pricing accuracy, margin protection, and seamless connectivity. Trusted by lenders nationwide, Optimal Blue empowers smarter decisions and scalable growth in any market. Learn more at OptimalBlue.com.

FULL-LENGTH DESCRIPTION (CREDIT UNION – 98 WORDS, 694 CHARACTERS)

Optimal Blue is the modern, proven engine behind credit union mortgage lending. As the only end-to-end capital markets platform bridging primary and secondary mortgage markets, we help credit unions operate efficiently and foster lasting member relationships on ever loan. Our cloud-native, API-first platform is powered by automation, generative AI, and real-time data. With over 20 years of experience and leading market share, we deliver measurable ROI through pricing accuracy, margin protection, and seamless connectivity. Trusted by credit unions nationwide, Optimal Blue empowers smarter lending decisions so credit unions can serve members in any market. Learn more at OptimalBlue.com.

SHORT-LENGTH DESCRIPTION (GENERAL – 40 WORDS, 303 CHARACTERS)

Optimal Blue is the modern, proven engine behind lender profitability. Our end-to-end capital markets platform delivers pricing accuracy, margin protection, and measurable ROI through cloud-native technology, automation, and data – helping lenders operate efficiently and scale for growth in any market.

OUR MISSION AND VALUES

WHY WE EXIST: OUR MISSION

Optimal Blue's mission is to help lenders maximize their profitability on every loan transaction so they can continue to help people achieve the dream of homeownership.

PRINCIPLES THAT GUIDE OUR BEHAVIOR: OUR VALUES

TAKE OWNERSHIP

We champion a culture of ownership, accountability, and empowerment so that everyone can take action when it is needed, no matter whose responsibility it should be. We don't sit back, but rather we are proactive and results-oriented, with an expectation of making and delivering on commitments. We don't work in silos. We don't point fingers. We just get stuff done.

INNOVATE WITH PURPOSE

We always move toward our mission. We come together to tackle challenges head on, encourage new ideas, and relentlessly take things over the finish line. We don't innovate because it's cool, but because we can solve specific problems or create specific opportunities for our clients. We lead the industry forward. We set the bar. We are the point of reference.

SERVE AUTHENTICALLY

Each individual's unique perspective is important. By listening, learning, and challenging each other, the best and right ideas win. We say what we mean, and we mean what we say. We don't surprise our customers or our teammates. We show up every day. We help one another succeed. We help our clients win.

ACT WITH URGENCY

Showing up in the smallest moments is how we make a big difference. We strive to make a mark in everything we do. We exceed expectations and deliver meaningful experiences and innovation for our clients – so they can do the same for their customers. We move quickly. We take action to deliver value. We work to build trust.

BRAND PILLARS

At Optimal Blue, our brand pillars reflect the unique combination of modern technology, proven expertise, and measurable results that uniquely reinforce our position as the engine that powers lender profitability.

MAXIMIZED LENDER PROFITABILITY

ADVANCED MARGIN MANAGEMENT
We help lenders proactively protect margins and maximize profitability with real-time data, hedging tools, and predictive analytics.

VALUE-DRIVEN RETURN ON INVESTMENT
We design every product, feature, and decision to drive measurable ROI – from pricing precision to margin protection and everything in between.

OPTIMIZED STRATEGIC ADVANTAGE
We help lenders optimize their advantage in any market – combining modern technology, rich data insights, and seamless connectivity to maximize profitability from pricing accuracy to margin protection, and every step in between.

MODERN TECHNOLOGY

CLOUD-NATIVE INFRASTRUCTURE
We built our cloud-native, API-first platform to evolve – delivering speed, scalability, and resilience through automation, AI, and real-time data.

ENHANCED AUTOMATION & GENERATIVE AI
We apply generative AI, machine learning, and automated workflows to streamline operations, reduce risk, solve real challenges, and accelerate decision-making across the mortgage lifecycle.

END-TO-END CAPITAL MARKETS PLATFORM
We deliver a seamless, integrated solution from origination to post-close – maximizing efficiency and profitability at every stage of the capital markets ecosystem.

API-FIRST, OPEN NETWORK CONNECTIVITY
With an API-first approach, we support 70+ certified integration partners through an open network that ensures flexibility, speed, and seamless collaboration across the mortgage ecosystem.

REAL-TIME INTELLIGENCE
We provide proprietary data and analytics that deliver granular, actionable insights, empowering smarter, faster decisions at both the loan and enterprise levels.

PROVEN RESULTS

UNRIVALED ACCURACY
We equip lenders with trusted pricing tools that help avoid costly errors and stay ahead of market shifts with confidence.

TRUSTED EXPERTISE
We bring over 20 years of experience and the largest market share in capital markets tech – delivering unmatched insight, stability, and credibility.

RELIABLE PERFORMANCE
We power over a third of mortgages priced and locked in the U.S. and nearly 40% of loans sold into the secondary market – making us the most trusted name in mortgage capital markets.

VERIFIED COMPLIANCE
We offer automated oversight tools that help lenders stay ahead of regulatory demands, manage counterparty risk, and protect their margins.

OUR TAGLINE

Modern. Proven.

Our tagline is a powerful expression that captures the promise we make to our clients and the values we stand for. To ensure a unified and consistent brand presence, when used, the tagline will be locked up with the logo in a set placement.

WHAT OUR TAGLINE MEANS

Modern.

Optimal Blue is built on a foundation of modern innovation that's designed to evolve. Our platform is API-first, cloud-native, and architected for scale, speed, and resilience. We leverage generative AI, machine learning, and real-time data syncing to deliver automation that adapts to market shifts and regulatory changes without disruption. Modern isn't just about sleek design – it's about infrastructure that empowers lenders to move faster, work smarter, and stay ahead.

Proven.

With decades of experience and the largest market share in key capital markets segments, Optimal Blue is the most trusted name in mortgage technology. Our deep expertise, honed over decades, powers the precision, compliance, and confidence our clients rely on every day. Our solutions are used to price-lock over a third of U.S. mortgages and support nearly 40% of loans hedged and sold into the secondary market. We've built a reputation on accuracy, reliability, and results. Our clients don't just trust our technology – they rely on it to drive performance every day.

BRAND DESIGN

MAIN LOGO

The Optimal Blue logo is a bold expression of who we are: modern, trusted, and performance driven. It combines a clean, contemporary wordmark with a dynamic icon that reflects our role as the engine behind lender profitability. Designed to be both tech-forward and timeless, the logo signals our commitment to innovation, precision, and connection across the capital markets ecosystem. The logo reinforces our position as the most trusted name in mortgage capital markets technology – delivering real ROI, every insight, every lock, every decision.

BRAND DESIGN

STACKED LOGO

The stacked version of the Optimal Blue logo is designed for flexibility and clarity in compact or square spaces. By vertically aligning the icon above the wordmark, this alternate layout ensures strong visual presence and legibility when horizontal space is limited – such as in social media profiles, app icons, or mobile-first environments. It maintains the integrity of our brand while adapting to modern digital formats, ensuring the logo remains bold, recognizable, and impactful at any size.

BRAND DESIGN

LOGO SIZING

Our logo has various sizing to accommodate most spatial needs. The minimum size of the logo icon should be BLANK pixels. When the need arises for smaller than this width, such as for swag items (pens as an example), it is recommended to just use the wordmark without the icon or our web site in the logo font.

CLEAR SPACE

x = clear space

MINIMUM SIZE

Digital

30 pixels high

Print

.125 inches high

BRAND DESIGN

LOGO ICON

A Symbol of Modern Innovation and Proven Performance

The Optimal Blue icon is more than a visual mark – it's a strategic expression of who we are and what we deliver.

The circular form represents unity, continuity, and the full lifecycle of the capital markets. Within it, the interconnected lines and nodes reflect the core of our platform: modern, API-first technology built for speed, scale, and seamless connectivity. It visually conveys our role as the central hub that connects lenders, investors, and partners across the mortgage ecosystem.

The dual-sided symmetry of the icon brings together two essential brand truths: we are both modern and proven. One side symbolizes innovation – cloud-native infrastructure, generative AI, and automation at scale. The other side reflects our legacy of trust – 20+ years of experience, market leadership, and unmatched pricing accuracy. Together, they form a balanced, forward-looking identity that's grounded in results.

This icon also reinforces our position as the engine that powers lender profitability from unrivaled pricing accuracy to advanced margin management. It's a visual shorthand for intelligence, precision, and performance that define our platform – and the value we deliver with every insight, every lock, every decision.

Whether used on its own or alongside our wordmark, the icon is a bold, tech-forward signal of our commitment to helping clients optimize their advantage in any market.

COLOR PALETTE

PRIMARY COLORS

Our primary color palette is the visual cornerstone of the Optimal Blue brand. It reflects our identity – modern, trusted, and performance driven – and ensures consistency across all touchpoints. These colors were selected to convey clarity, confidence, and innovation, while maintaining accessibility and visual harmony. The palette is designed to be flexible across digital and print applications, supporting everything from executive presentations to event signage.

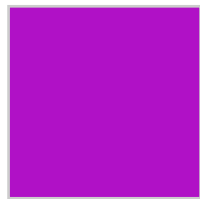| NAVY	BLUE	WHITE	LIGHT GRAY	MEDIUM GRAY	DARK GRAY	BLACK
#071D54	#2E86C1	#FFFFFF	#DDDDDD	#707070	#424242	#000000
RGB 7-29-84	RGB 46-134-193	RGB 255-255-255	RGB 221-221-221	RGB 112-112-112	RGB 66-66-66	RGB 0-0-0
CMYK 100-94-34-36	CMYK 78-38-4-0	CMYK 0-0-0-0	CMYK 12-9-10-0	CMYK 57-48-48-15	CMYK 67-60-59-45	CMYK 75-68-67-90
PANTONE 279C	PANTONE 2766C					
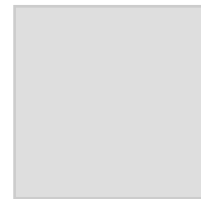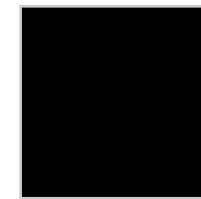
COLOR PALETTE

SECONDARY COLORS

Our secondary color palette adds vibrancy and flexibility to the Optimal Blue brand. These colors are designed to complement our primary palette, offering creative range for moments when visual emphasis or a modern, tech-forward aesthetic is needed. Whether used to highlight key elements in documents, energize web interfaces, or inject personality into digital experiences, these hues serve as strategic accents. Secondary colors should not replace colors in the Optimal Blue logo or main color usage.
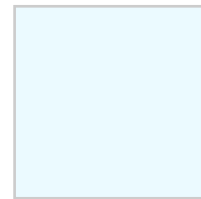
MAGENTA	**GREEN**	**NEON BLUE**	**LIGHT BLUE**
#B011C6	#409971	#82DCFE	#EBFAFF
RGB 176-17-198	RGB 64-153-113	RGB 130-220-254	RGB 235-250-255
CMYK 46-88-0-0	CMYK 75-19-69-3	CMYK 42-0-0-0	CMYK 6-0-0-0

GRADIENT

NAVY	**BLUE**
#071D54	#2E86C1
RGB 238-118-25	RGB 46-134-193
CMYK 3-66-99-0	CMYK 78-38-4-0
PANTONE 279C	PANTONE 2766C

TYPOGRAPHY

Typography is a foundational element of the Optimal Blue brand identity. It brings structure, clarity, and personality to our communications – ensuring every message is both legible and aligned with our voice. Our selected typefaces reflect a balance of professionalism and modernity, supporting a wide range of applications from digital interfaces to executive presentations. By following the hierarchy and usage guidelines outlined here, we maintain consistency across all touchpoints and reinforce the brand's credibility and cohesion. If none of the below font types are available, please use a standard font like Arial or Verdana.

FONT SAMPLES:

Logo font: Azo Sans

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0

HEADER 1

Azo Sans Bold 24 px

HEADER 2

Azo Sans Light 18 px

Body text

Azo Sans Light 12 px

Microsoft font: Segoe UI

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0

HEADER 1

SegoeUI Bold 24 px

HEADER 2

Segoe UI Regular 18 px

Body text

Segoe UI Regular 12 px

Alternate/acceptable font: Montserrat

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
1 2 3 4 5 6 7 8 9 0

HEADER 1

Montserrat Bold 24 px

HEADER 2

Montserrat Regular 18 px

Body text

Montserrat Regular 12 px

BRAND GRAPHICS

MAIN GRAPHIC

The Main Graphic is a signature visual element that creatively reinterprets the Optimal Blue logo into a dynamic, design-forward expression of our brand. It draws from the core shapes and energy of the logo to create a graphic that is both distinctive and visually engaging. This element should be used in direct connection with the logo – appearing alongside it in layouts where a unified brand impression is desired. Each version of the Main Graphic is available in two color treatments: a monochromatic style based on our primary color palette for a clean, cohesive look, and a more vibrant version that incorporates pops of color from our secondary palette to add energy and dimension.

LEGAL GUIDELINES

TRADEMARK USAGE

Proper use of Optimal Blue's trademarks is essential to protecting the integrity and legal standing of our brand. Trademarks – including our name, logo, and any associated taglines – must always be used in accordance with the guidelines outlined here to ensure consistency, clarity, and compliance. These standards apply across all internal and external communications, marketing materials, and digital assets. Unauthorized or incorrect usage can dilute our brand equity and create legal risk. Always refer to this section when incorporating trademarks into your work and consult the brand team with any questions.

COPYRIGHT INFORMATION

All content contained within these brand guidelines – including but not limited to logos, typography, color palettes, imagery, and messaging – is the intellectual property of Optimal Blue and is protected under applicable copyright laws. Unauthorized use, reproduction, or distribution of any brand assets without prior written consent is strictly prohibited. These materials are intended solely for approved internal and partner use to ensure brand consistency and legal compliance. When in doubt, always consult the brand or legal team before using or adapting any copyrighted elements.