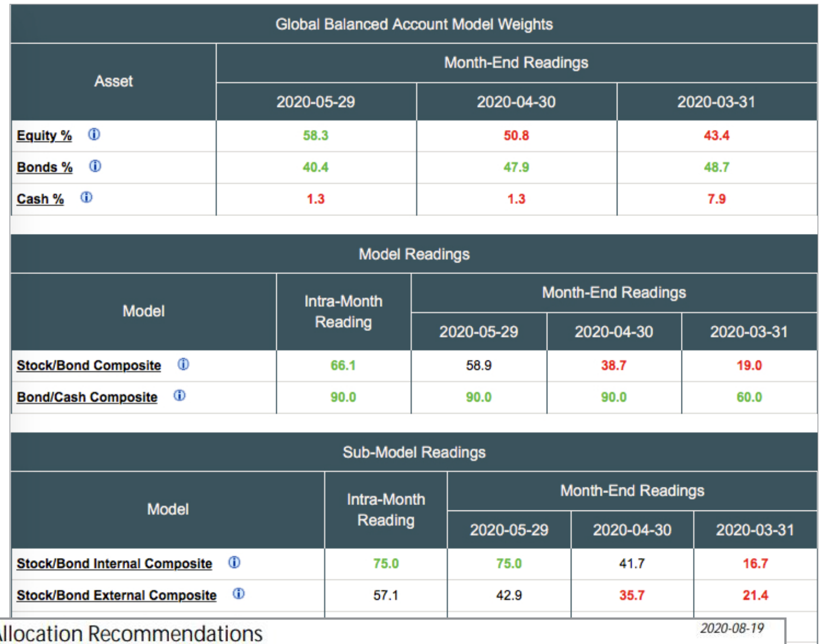
Asset Allocation Model

Build a complete asset allocation strategy that aggregates and centralizes competing ideas into an objective framework. Avoid risk by removing the emotion and inconsistency that often derails sound strategies. Specifications Include:

- 7 Asset Classes
- NDR Factors and limited custom factors
- Small-Medium Universe
- Complexity of output



Global Balanced Account Model Weights

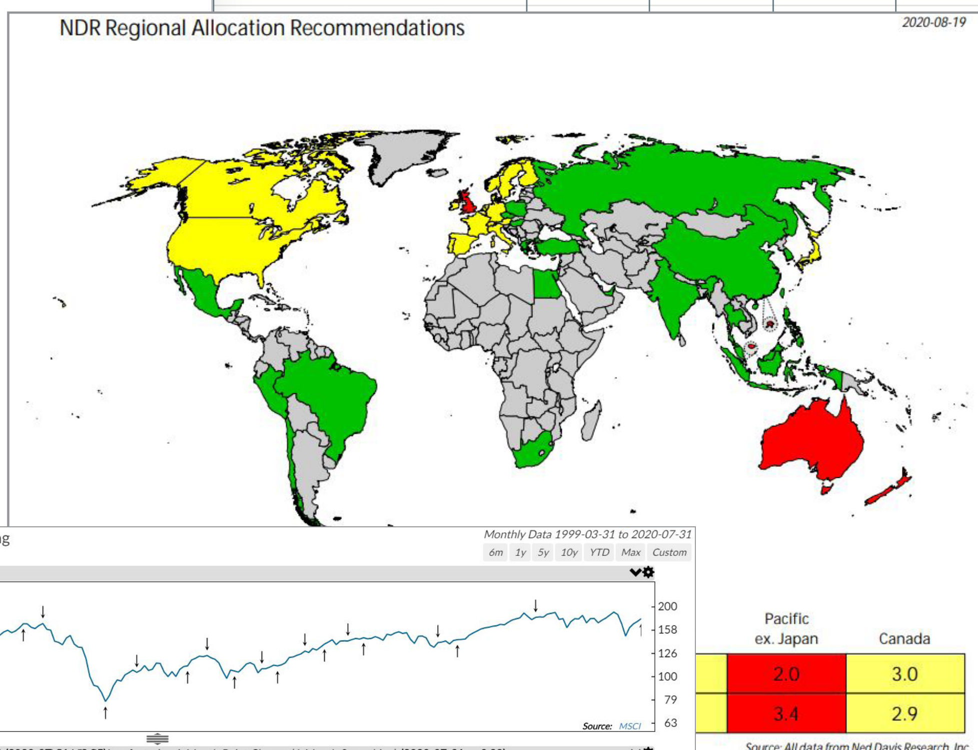
Asset	Month-End Readings 2020-05-29	Month-End Readings 2020-04-30	Month-End Readings 2020-03-31
Equity %	58.3	50.8	43.4
Bonds %	40.4	47.9	48.7
Cash %	1.3	1.3	7.9

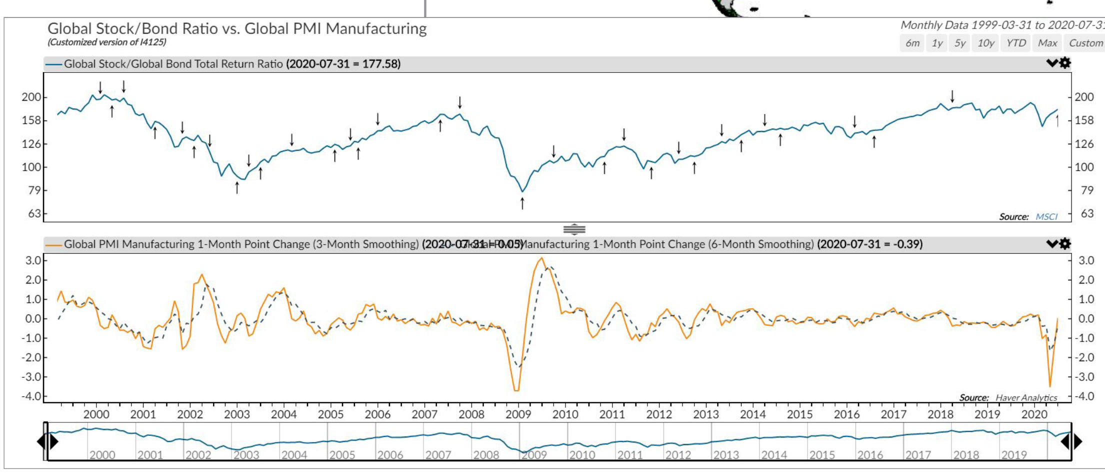
Model Readings

Model	Intra-Month Reading	Month-End Readings 2020-05-29	Month-End Readings 2020-04-30	Month-End Readings 2020-03-31
Stock/Bond Composite	66.1	58.9	38.7	19.0
Bond/Cash Composite	90.0	90.0	90.0	60.0

Sub-Model Readings

Model	Intra-Month Reading	Month-End Readings 2020-05-29	Month-End Readings 2020-04-30	Month-End Readings 2020-03-31
Stock/Bond Internal Composite	75.0	75.0	41.7	16.7
Stock/Bond External Composite	57.1	42.9	35.7	21.4





For More Information

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