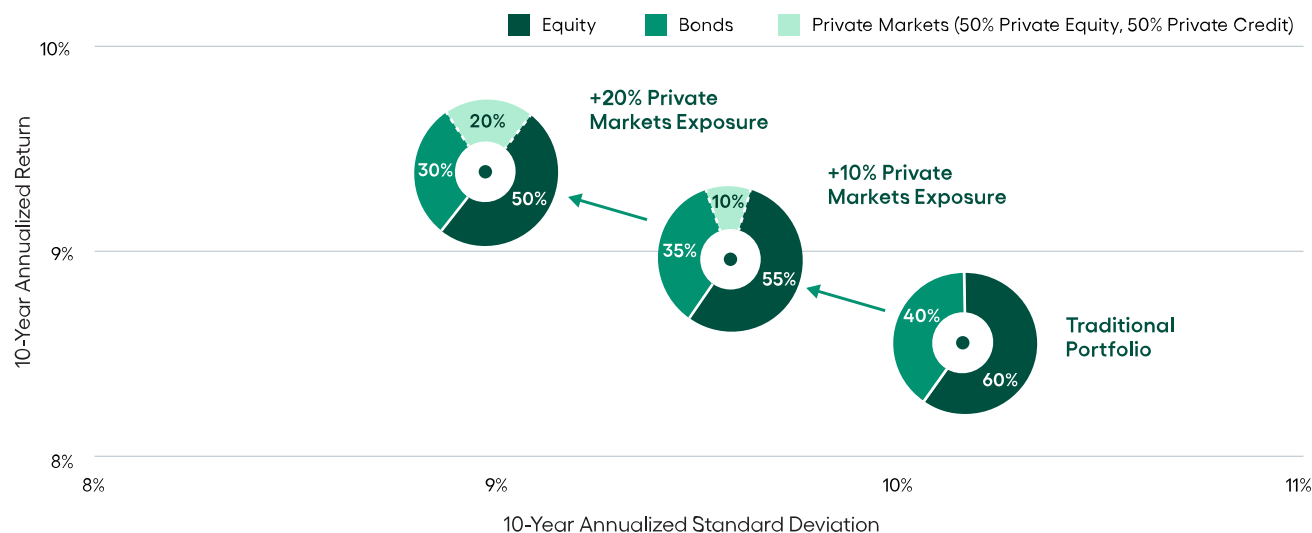


Reimagining Traditional Portfolio Construction

Increasing allocations to private market solutions may help generate higher risk-adjusted returns over the long term.

Impact of Adding Private Markets Exposure



Sources: Preqin and FactSet.

Potential Benefits of Allocating to Private Markets:

- ▶ Higher risk-adjusted returns
- ▶ Access to a larger investment universe
- ▶ Greater portfolio diversification
- ▶ Reduced correlation to public markets

Key Portfolio Construction Considerations

Investment Objectives

Review short- and long-term investment considerations, such as growth goals and income needs

Risk Tolerance

Evaluate appetite for risk and comfort with less investment transparency

Liquidity

Understand the benefits and limitations of less liquid investment strategies

Note: Data as of 12/31/2024. Private Markets are represented by 50% Preqin Private Equity Index and 50% Preqin Private Credit Index. Equity is represented by the S&P 500® Index. Bonds are represented by Bloomberg U.S. Aggregate Bond Index. **Past performance does not guarantee future results.**

MORE INFORMATION

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