# RISK-MANAGED ASSET ALLOCATION PORTFOLIOS

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## Asset Allocation for March 2024

| | | ← less exposure | | | more exposure → | |
|---|---|---|---|---|---|---|
| | | Min Allocation | Under-weight | Baseline Allocation | Over-weight | Max Allocation |
| **EQUITIES** | U.S. | | | | ▼ | |
| | Foreign Developed | | | ■ | | |
| | Emerging Market | | ▲ | | | |
| **QUASI-EQUITY** | Real Estate | | | ■ | | |
| **BONDS** | U.S. Treasury | | ▼ | | | |
| | International Treasury | | ▼ | | | |
| | Inflation-Protected | ■ | | | | |
| **ALTERNATIVES** | Hedge Strategies | | | ■ | | |
| **LIQUID** | Short-Term & Cash Equivalents | | | | ▲ | |

■ No change from last month
▲ Increasing compared to last month
▼ Decreasing compared to last month

# DISCLAIMER

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Adjustments can vary across strategies depending on each strategy's objectives. What's illustrated above most closely reflects allocation adjustments for the Growth Strategy.

For informational purposes only. Not a recommendation of any particular security or strategy. This is a proposed target allocation and investment strategy. Final allocation of the portfolio may differ from the targets listed above.

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