

Balanced

Portfolio stability at any economic cycle



Balanced



Investments in major asset classes according to the Risk Parity¹ approach

Long-term Approach

aiming for stable results in all phases of the economic cycle

Wide Diversification

including stocks, bonds, commodities, and inflation hedges

Flexible Management

portfolio structure adjustments in response to different market conditions

8%⁺

net expected annual return²

up to **12%**
possible drawdown³

USD	strategy currency
100 000	minimum amount
0.5%	management fee

2⁺ years

recommended period

¹ Risk Parity is a portfolio allocation strategy that uses risk to determine allocations across various components of an investment portfolio

² Assessment is performed by the portfolio manager based on the analysis of the value growth potential and current market situation

Traditional Approach



To achieve portfolio diversification, investors often use the traditional approach

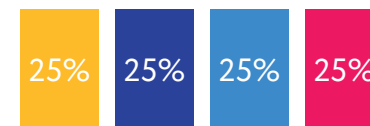
Each asset class has an equal weight, leading to low risk diversification

This leads to an illusion of diversification, as 60-90% of the portfolio risk is concentrated in equity

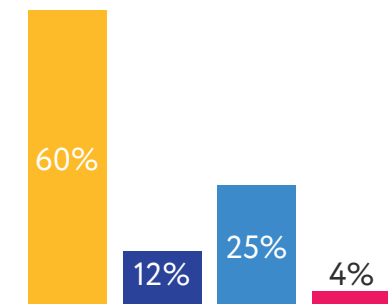
Investor's Portfolio

● Equity ● Fixed Income ● Commodities ● Inflation Hedge

Asset weight



Risk distribution



Risk Parity



Risk is evenly distributed across each asset class

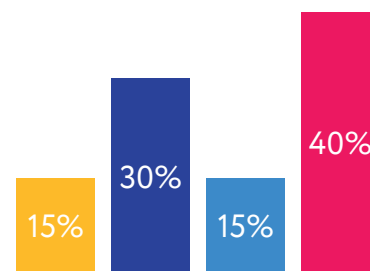
This reduces the portfolio's sensitivity to market fluctuations

This achieves a more stable outcome compared to the traditional approach

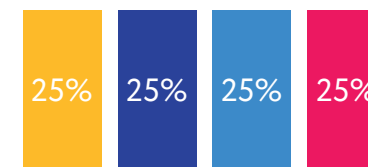
Investor's Portfolio

● Equity ● Fixed Income ● Commodities ● Inflation Hedge

Asset weight



Risk distribution



PM's Approach

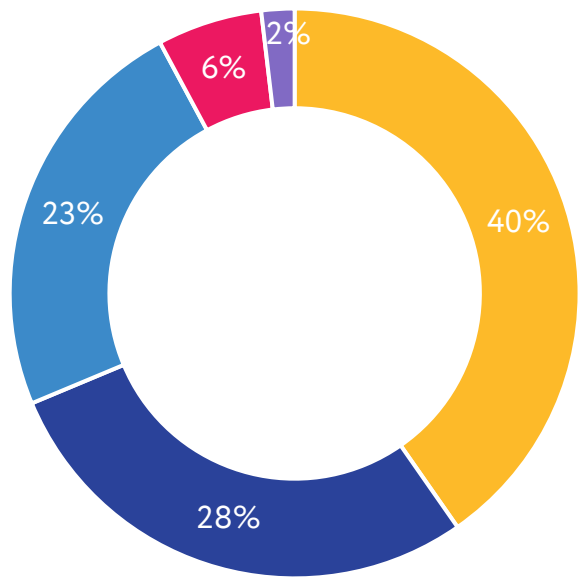


The portfolio is rebalanced quarterly by the portfolio manager in line with risk-level changes of the assets

Instruments' risk is assessed using an automated algorithm

Model portfolio

Fixed Income Commodities and Inflation Hedge Equity Crypto Cash



Top 5 positions

GLD US	12%
Gold	
WIP US	9%
Non-US inflation-linked bonds	
VMBS US	8%
Mortgage-backed securities	
HYD US	8%
Municipal bonds	
VCIT US	7%
Corporate bonds	

The portfolio is formed taking into account the current market situation and is relevant as of July 2025. The composition of the current portfolio may differ

Performance



↑ **23.4%**

return since the strategy's inception

↑ **9.6%**

since the beginning of 2025

Historical Return, %





See you soon

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