

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

³ CVaR (a risk measure that evaluates the average loss in the worst 20% of cases) over a 1-year horizon.

Traditional Approach



To achieve portfolio diversification, investors often use the traditional approach

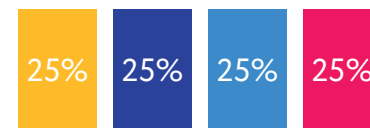
Each asset class has an equal weight, leading to low risk diversification

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

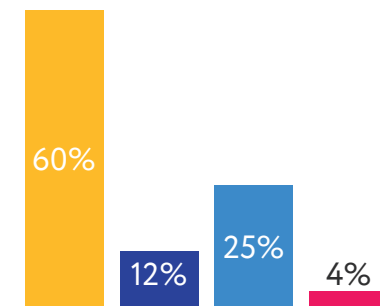
Investor's Portfolio

● Equity ● Fixed Income ● Commodities ● Inflation Hedge

Asset weight



Risk distribution



Risk Parity



Risk is evenly distributed across each asset class

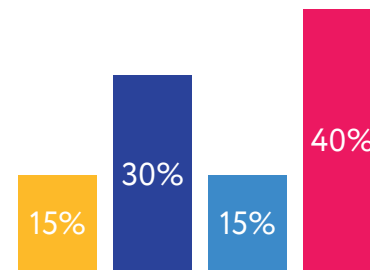
This reduces the portfolio's sensitivity to market fluctuations

This achieves a more stable outcome compared to the traditional approach

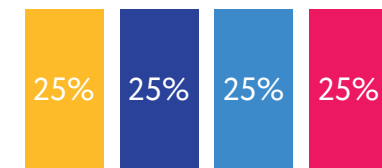
Investor's Portfolio

● Equity ● Fixed Income ● Commodities ● Inflation Hedge

Asset weight



Risk distribution



PM's Approach

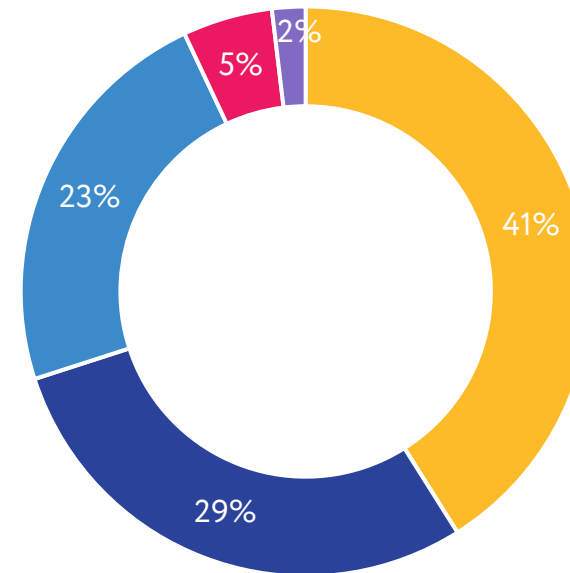


The portfolio is rebalanced quarterly by the portfolio manager in line with risk-level changes of the assets

Instruments' risk is assessed using an automated algorithm

Model portfolio

● Fixed Income ● Inflation Hedge ● Equity ● Crypto ● Cash



Top 5 positions

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

Performance



↑ **34.4%**

return since the strategy's inception

↑ **0.6%**

since the beginning of 2026

Historical Return, %





Contact us

+971 2 675 9222

@ client@acmgroup.ae

[website](#)

Al Maqam Tower

ADGM Square, Al Maryah Island,
Abu Dhabi, UAE

[by taxi](#)

[by car](#)

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OFFICIAL CORRESPONDENCE

Official Correspondence must be sent via postal mail to:

ACM LIMITED

Unit 1, Floor 9, Al Maqam Tower, ADGM Square, Al Maryah Island, Abu Dhabi, United Arab Emirates

Phone: +971 2 675 9200