acm

Balanced

Portfolio stability at any economic cycle

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Balanced

Investments in major asset classes according to the Risk Parity[1] 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 return[2]

up to **12%**

possible drawdown[3]

USD	strategy currency
100 000	minimum amount
0.5%	management fee

2+ years

recommended period

Monthly results

Factsheet

[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.

Performance

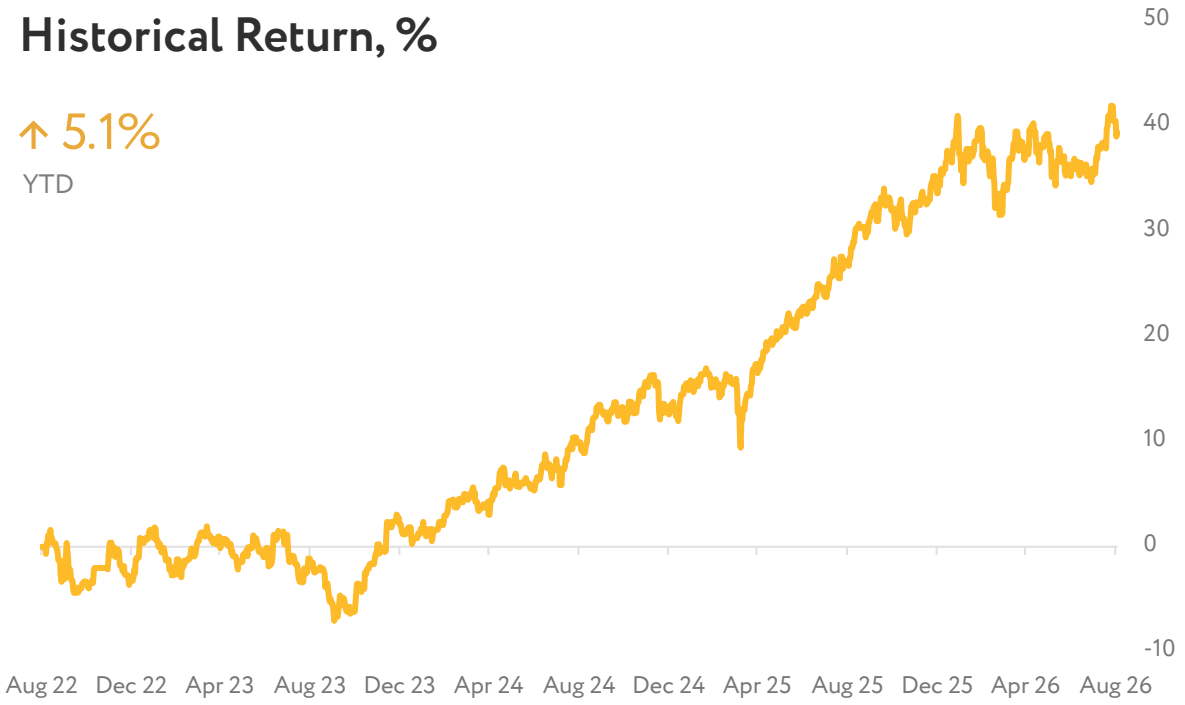
↑ 39.5%

return since the strategy’s inception

↑ 8.6%

since inception, annualised

Historical Return, %



↑ 3.7%	↑ 0.9%	↑ 0.5%	↑ 10.7%	↑ 27.8%
1 month	2 months	6 months	1 year	2 years

The strategy net return as of 02.09.2026

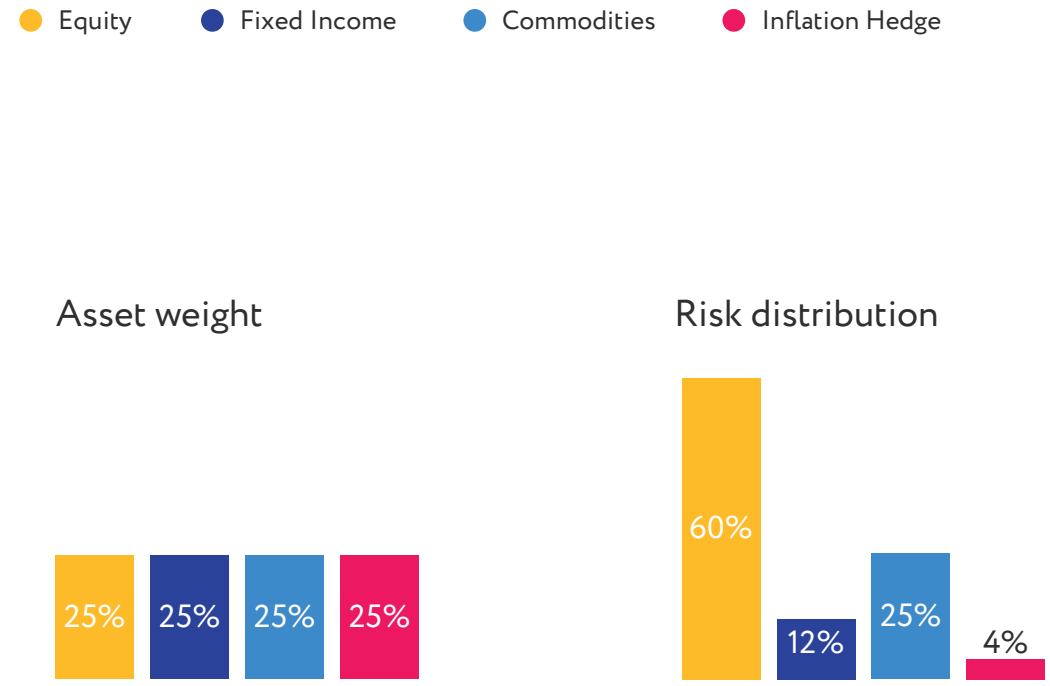
Traditional Approach

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



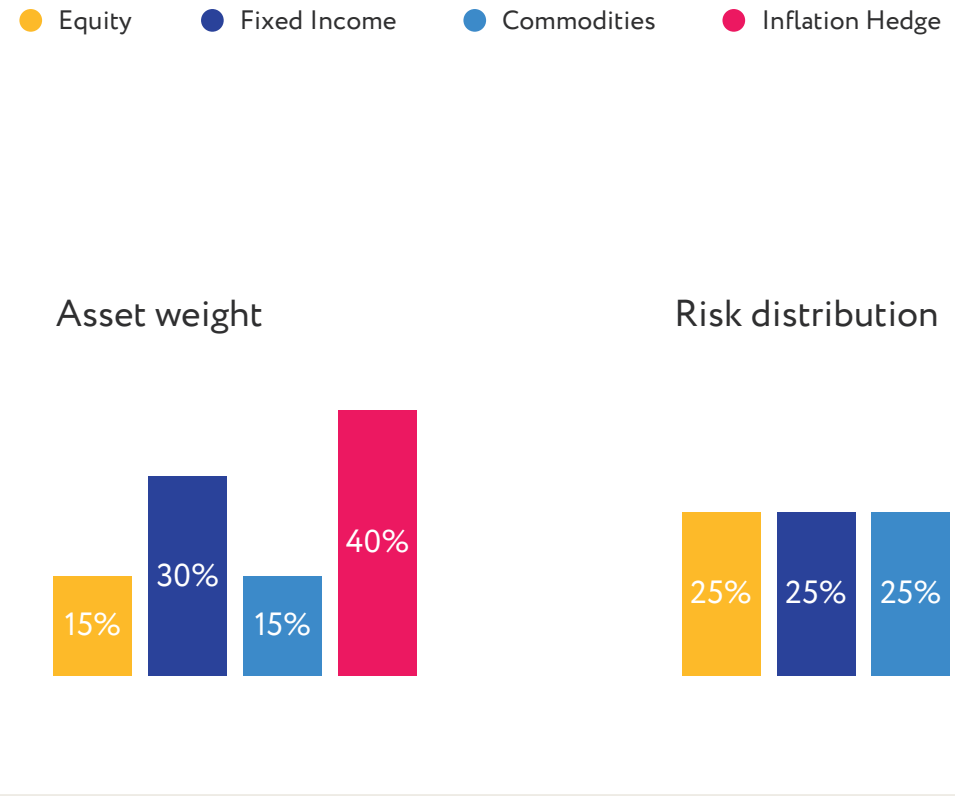
Risk Parity

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



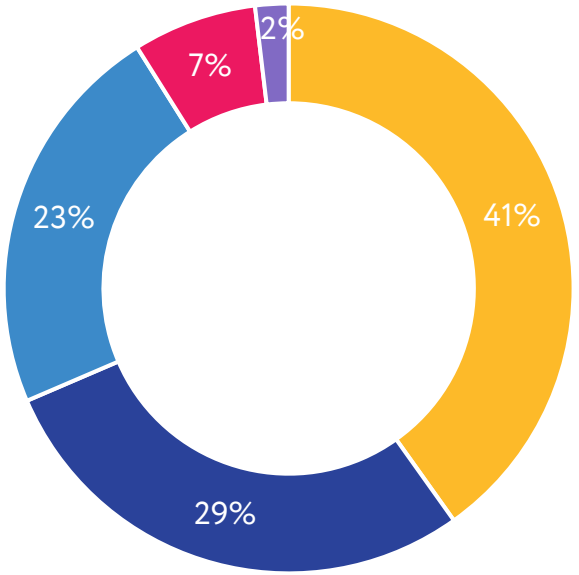
PM's Approach

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%

The portfolio is formed taking into account the current market situation and is relevant as of 02.09.2026
The composition of the current portfolio may differ

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