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# Balanced

Portfolio stability  
at any economic cycle

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# Balanced



Investments in major asset classes  
according to the Risk Parity<sup>1</sup> approach

## Long-term Approach

aiming for stable results in all phases  
of the economic cycle

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## Wide Diversification

including stocks, bonds,  
commodities, and inflation hedge

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## Flexible Management

portfolio structure adjustments  
in response to different market  
conditions

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

# Balanced



Investments in major asset classes  
according to the Risk Parity<sup>1</sup> approach

# 8%<sup>+</sup>

net expected annual return<sup>2</sup>

# 2<sup>+</sup> years

recommended period

up to **12%**  
possible drawdown<sup>3</sup>

USD strategy currency  
100 000 minimum amount  
0.5% management fee

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

<sup>2</sup> Assessment is performed by the portfolio manager considering the analysis of the value growth potential and current market situation

<sup>3</sup> Evaluation of the risk is performed by the portfolio manager based on indicators of 12-month implied volatility and historical volatility over 260 trading days according to Bloomberg data

# Traditional Approach



To diversify their portfolio, investors often use the traditional approach

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

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

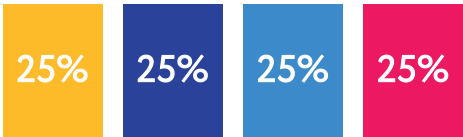
# Traditional Approach



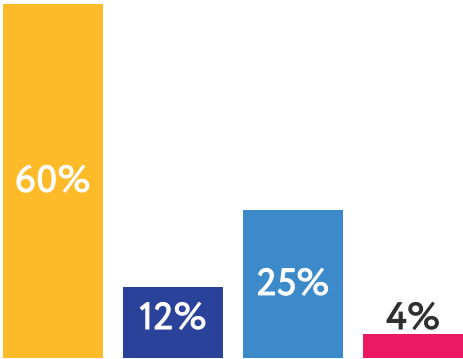
## Investor's Portfolio

- Equity
- Fixed Income
- Commodities
- Inflation Hedge

### Asset weight



### Risk distribution



# Risk Parity



Risk is evenly distributed across each asset class

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Reducing the portfolio's sensitivity to market fluctuations

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Achieving a more stable outcome compared to the traditional approach

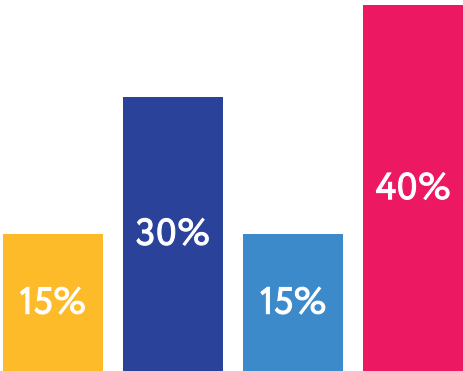
# Risk Parity



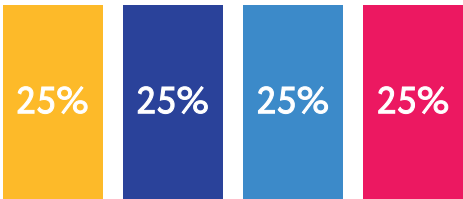
## Investor's Portfolio

- 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

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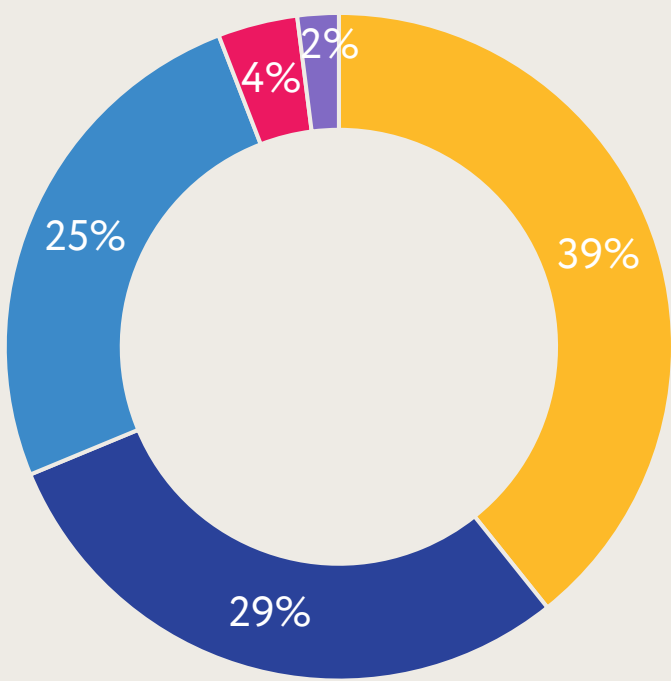
Instruments' risk is assessed using an automated algorithm



# PM's Approach



- 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 09.02.2026

↑ 36.7%

return since the strategy's inception

↑ 2.3%

since the beginning of 2026





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