

Conventional Investments

Equities (Stocks):

An investment security that signifies an ownership position or equity in a corporation, and represents a claim on its proportionate share in the corporation's assets and profits:

- U.S. Large Cap: U.S. companies with a market capitalization of more than \$10 billion.
- U.S. Mid Cap: U.S. companies with a market capitalization of \$3 billion to \$10 billion.
- U.S. Small Cap: U.S. companies with a market capitalization of \$300 million to \$3 billion.
- U.S. Micro Cap: U.S. companies with a market capitalization of \$50 million to \$300 million.
- International Developed Market: foreign companies in developed economies.
- International Emerging Market: foreign companies in developing economies.

Fixed Income (Bonds):

An investment security that pays a specific interest rate, such as a bond, money market instrument, or preferred stock:

- Fixed Income — Domestic: bonds issued by U.S. governments and corporations.
- Fixed Income — Global: bonds issued outside the country where a currency is denominated.

Alternative Investments

Alternative Assets:

An investment security that is not one of the conventional, publicly-traded investment types such as stocks and bonds:

- Liquid Real Assets (LRA): Exposure to real things such as real estate, commodities, etc.
- Private Capital: Private equity, private debt and alternative assets.

Alternative Strategies:

Discretionary investment manager strategies utilizing traditional asset classes to profit in either rising or falling markets:

- Hedged Equity: Buying undervalued stocks and selling short overvalued stocks.
- Managed Futures: Seeking to exploit market trends.
- Diversified Alternatives: Seeking to exploit market inefficiencies.

© 2022 Alloodium Investment Consultants

The information provided is for educational purposes only and is not intended to be, and should not be construed as, investment, legal or tax advice. Alloodium makes no warranties with regard to the information or results obtained by its use and disclaim any liability arising out of your use of or reliance on the information. The information is subject to change and, although based upon information that Alloodium considers reliable, is not guaranteed as to accuracy or completeness. Past performance is not a guarantee or a predictor of future results of either the indices or any particular investment.