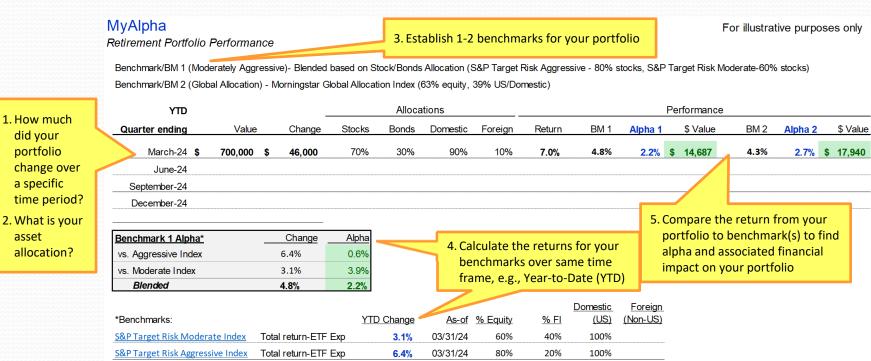
Finding alpha for your investment portfolio



4.3%

10.4%

03/31/24

03/31/24

63%

100%

37%

0%

39%

100%

61%



Morningstar Global Allocation

S&P 500 Index

Total return

Total net return

1. How much

did your portfolio

a specific

allocation?

asset

change over