



COMPLETE, MULTI-STRATEGY DIVERSIFICATION IN A COHESIVE, SINGLE-SLEEVE MODEL PORTFOLIO —

There's An Easier Way to Meet Your Clients' Investment Expectations

We all know the benefits of a well-diversified portfolio. But diversification can also come with increased cost and complexity, two pain points that may be unnecessary for long-term, retirement-focused investors.

For those in search of risk-targeted diversification in a simple, manageable, and cost-effective vehicle, we built the Multi-Market Portfolio Series — models that offer multi-manager diversification, strategically blended for your clients' risk profile in a single-sleeve package.

DIVERSIFICATION MADE EASY

Each Multi-Market Portfolio Series model features a blend of three key investment disciplines — Core Beta, Active & Tactical, and Income & Diversifying. These disciplines are strategically balanced to seek risk-appropriate performance across a variety of market scenarios, without major overhauls to the portfolio's structure. Each allocation is represented by a fund that plays a clear role in the portfolio. When blended together, these funds work in balance, with the goal of tracking toward the investment objective with greater consistency.



BLENDS:

- ALL EQUITY
- GROWTH
- BALANCED GROWTH
- BALANCED
- BALANCED INCOME
- INCOME

CORE BETA



ACTIVE & TACTICAL



MAIN
MANAGEMENT, LLC



POTOMAC

INCOME & DIVERSIFYING

ICON
Advisers, Inc.

THREE KEY BENEFITS TO YOUR PRACTICE & CLIENTS



GIVE CLIENTS A PORTFOLIO THAT MAKES SENSE

The risk objective is clear. The role each fund plays within the strategy is clear. And the value of multiple strategists working together in a single portfolio is clear.



REDUCE UNNECESSARY COSTS & RESTRICTIONS

With no additional strategist fees, Multi-Market Portfolios deliver multiple managers in a single sleeve — potentially reducing sleeve contribution minimums.



ENJOY WHITE GLOVE SUPPORT

Each strategist within the series is highly accessible and collaborative — available to address any questions you or your clients might have. We're here for you.

LEARN MORE



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