MACRO PORTFOLIOS

A big picture approach to managing risk in an ETF Portfolio

NewSquare Capital's Macro Portfolio series helps you pursue long-term goals by combining the low costs and simplicity of exchange traded funds – ETFs – with an innovative risk-management strategy guided by macro-economic analysis.

A DIVERSIFIED APPROACH **BUILT AROUND ETFS**

The Macro Portfolios combine active risk management at the asset allocation level with low-cost, passively-invested index ETFs representing a wide range of asset classes:

- US large-, mid-, and small-cap stocks
- Non-US developed and emerging-market stocks
- US taxable bonds, including Treasury, corporate, and high-yield bonds
- Specialty investments such as gold and real estate investment trusts (REITs)

A MACRO-ECONOMIC PERSPECTIVE

Our portfolio management team assesses macro-economic conditions around the world to understand:

- Where global economies are in the cycle (expansion, peak, contraction, or trough)
- Which geographic regions, asset classes, or sectors are likely to rise or fall, and
- How the various asset classes and sectors interact with each other.

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A FUNDAMENTAL FOCUS ON MANAGING RISK

We use macro data to gauge the overall risk environment and guide asset allocation decisions designed to produce attractive risk/returns over the long term. When macroeconomic conditions are favorable, the portfolios overweight ETFs representing more aggressive market segments. During high-risk market environments, the portfolios adapt by overweighting defensive asset classes.

WHY ETFS?

ETFs can offer investors substantial benefits by being:

- **Highly diversified**
- **Highly transparent**
- **Low-cost**
- **Tax-efficient**

A SIMPLER APPROACH TO ACHIEVING YOUR GOALS

NewSquare's mission is to use diversification and discipline to help you achieve better outcomes, and the Macro series is specifically designed to make it easier to invest for the long-term. The portfolios offer you a simple way to access the wealth-building opportunities of global markets without having to take concentrated risks, evaluate economic developments, or react in difficult markets.

> *"Passive investing shouldn't mean taking a passive approach to risk.*
>
> *– Joseph S. Rizzello, Chairman*

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