



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.





WHY ETFS?

ETFs can offer investors substantial benefits by being:

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

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.

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

newsquarecapital.com | info@newsquarecapital.com | 610-325-5909 or 877-313-1343

NewSquare Capital is an SEC registered investment advisor. MML Investors Services, LLC is an SEC registered investment advisor. Registration of an investment advisor does not imply any specific level of skill or training. A current copy of the NewSquare Capital and MML Investors Services, LLC Form ADV, Part 2 is available through your investment adviser representative or online by visiting www.adviserinfo.sec.gov. NewSquare Capital and MML Investors Services, LLC are co-advisors on the NewSquare Capital portfolios. The information herein is for informational purposes and is not intended to be, and should not be construed as, legal, tax, or investment advice. Recipients should consult their respective advisers regarding such matters.

Investing in any investment vehicle carries risk, including possible loss of principal, and there can be no assurance that any investment strategy will provide positive performance over a period of time. The asset classes and/or investment strategies described in this publication may not be suitable for all investors.

This document does not constitute a recommendation to buy or an offer to sell any security or investment strategy mentioned in the document. Any offer to invest in the firm's investment strategies can be made by a written agreement only. CRN202302-278731