

**GROWTH STRATEGIES**

# 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 global perspective**

Our portfolio management team assesses economic conditions as well as valuations around the world to understand:

Where global economies are in the cycle (expansion, peak, contraction, or trough)

Which regions and asset classes are offering the most attractive relative value

Which asset classes and sectors currently present the most risk to investors



## A FUNDAMENTAL FOCUS ON MANAGING RISK

We use macro data, market valuation, and yields to gauge the overall risk environment and guide asset allocation decisions to produce attractive risk/returns over the long term. When conditions and valuations warrant, the portfolios can be positioned to aggressively capture potential return. During periods of elevated risk and valuation, the portfolios can lower exposure to the parts of the global markets that present high levels of risk.



## 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.

### WHY ETFs?



ETFs can offer investors significant benefits by being:

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



“Many long-term investors look to manage risk while seeking broad exposure to financial markets. The Macro Portfolios offer just that.”

— LEE S. GROUT, CFA

SENIOR PORTFOLIO MANAGER

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