NewSquare Capital

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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 a 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 help us understand:

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

Which regions and asset classes may offer attractive relative value based on the team's analysis.

Which asset classes and sectors may present elevated 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 in an effort to manage risk and pursue long-term investment objectives. When conditions and valuations warrant, portfolio allocations may be adjusted to increase market exposure. During periods the team believes market risks are elevated, the portfolios may reduce exposure to certain asset classes or regions.

A SIMPLER APPROACH TO ACHIEVING YOUR GOALS

NewSquare's mission is to use diversification and discipline to support a long-term investment approach, 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 investment opportunities available in global markets through a professionally managed, diversified portfolio approach.

WHY ETFs?

ETFs can offer investors benefits by being:

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

"The Macro Portfolios are designed to provide diversified market exposure through a risk-managed approach."

— LEE S. GROUT, CFA

SENIOR PORTFOLIO MANAGER

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