6 Meridian

Emerging Markets Blend Portfolio

as of March 31, 2024

The Approach

The Emerging Markets Blend Portfolio seeks growth by investing in emerging market equities and debt. The portfolio is comprised of ETFs and mutual funds and is typically over-weighted to equities (stocks). The portfolio is designed for more aggressive investors, as the volatility in emerging market securities can be high. The equity portion of the portfolio is constructed primarily by utilizing country-specific ETFs weighted based upon size (market cap) and our assessment of the investment outlook for the country. The fixed income portion of the portfolio is allocated between US dollar and local currency denominated emerging market debt. The allocation will vary over time depending on our analysis of the relative attractiveness of each.

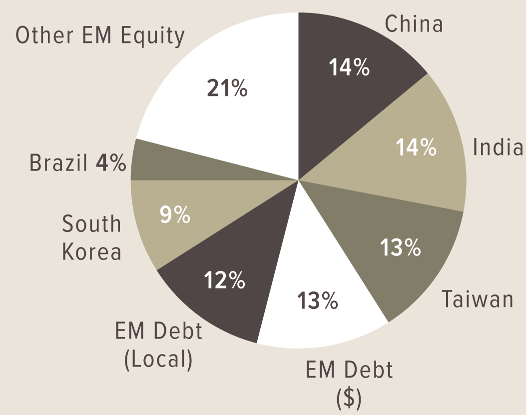
The Features

The Emerging Market Blend Portfolio can be an ideal complement to other equity investment strategies. Currently, emerging market equities comprise over 10-15% of the global equity market capitalization and have historically shown low correlation with US equity markets. The portfolio is diversified across emerging market countries and firms. The portfolio seeks to deliver superior risk-adjusted returns over the index through active management and relative-value analysis.

Key Facts

Strategy Assets	$77 Million
Holdings	9
Min Portfolio Size	$25,000
Benchmark	Blended EM Index*

Allocation



Top 5 Holdings (% weight)

iShares Core MSCI EM ETF	30.7%
Avantis Emerging Markets ETF	24.5%
Vanguard USD EM Bond Fund	12.5%
PIMCO LC EM Bond Fund	12.3%
Avantis Emerging Markets Value ETF	6.1%

*Blended EM Indes: 75% MSCI Emerging Markets Index; 12.5% JP Morgan EM Debt ($) Index; 12.5% JP Morgan EM Debt (Local) Index

Source: Addepar as of Mar. 2024; Bloomberg as of Mar. 2024

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