

The Approach

The International Equity Portfolio seeks growth by investing in international developed-market equity securities. 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 portfolio will also invest in mutual funds and ETFs to gain access to specific areas of the market (e.g., small cap, low volatility, high quality, etc.) determined by our analysis of the relative attractiveness of each area.

The Features

The International Equity portfolio can be an ideal complement to other equity investment strategies. Currently, international developed-market equities comprise over 25-30% of the global equity market capitalization and have historically shown low correlation with US equity markets. The portfolio is diversified across international countries and firms. The portfolio seeks to deliver superior risk-adjusted returns over the index through investment in factors found to be associated with long-term outperformance.

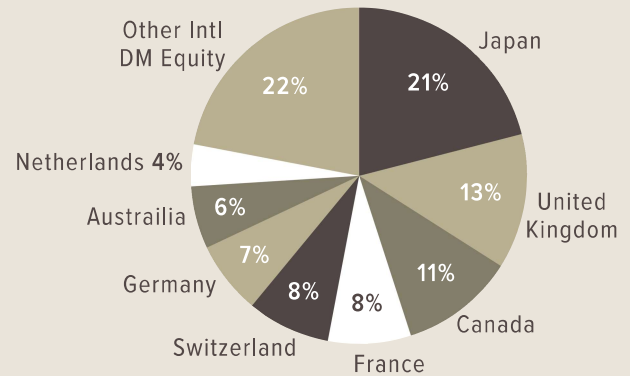
Key Facts

Strategy Assets — \$128 Million

Holdings — 19

Min Portfolio Size — \$25,000

Allocation (Bloomberg)



Top 5 Holdings (% weight)

JP Morgan BetaBuilders Japan ETF	13.3%
iShares United Kingdom ETF	8.6%
Goldman Sachs GQG Int'l Opportunities	8.3%
Avantis Int'l Small Value Equity ETF	7.6%
iShares Canada ETF	7.3%

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

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