

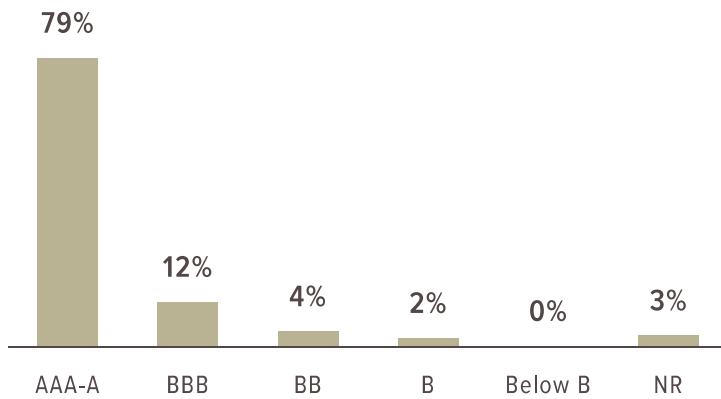
## The Approach

The Short Duration Portfolio seeks to generate current income by investing in a diversified set of low duration ETFs with exposures to various currencies, term structures, issuers, collateralization structures and economic sectors. The portfolio is also diversified globally among both developed and emerging market countries.

## The Features

The investment objective of the portfolio is capital preservation with a secondary goal of current income. The portfolio has a flexible mandate, with no constraints on credit quality, duration, geographic region or issuers.

## Credit Quality



## Key Facts

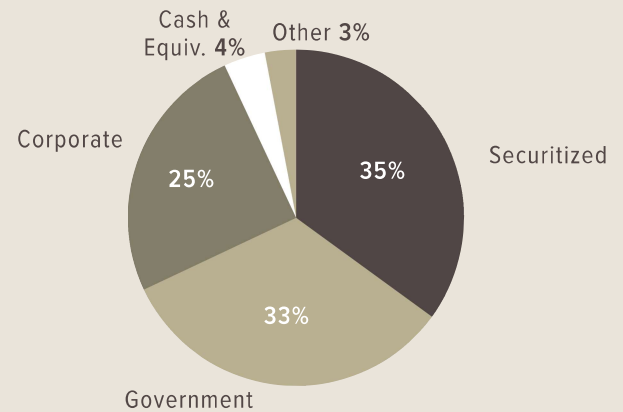
Assets Managed — \$90 Million

Holdings — 11

Min Investment — \$10,000

## Allocation

\*May not sum to 100 due to rounding.



## Top 5 Holdings (% weight)

JPMorgan Short Duration Core Plus ETF	14.7%
iShares Flexible Income ETF	10.7%
PIMCO Enhanced Low Duration ETF	9.8%
Vanguard Short Term Treasury ETF	9.8%
iShares Short Duration Bond ETF	9.8%

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

Morningstar Portfolio Dates: 11/30/2024 - VGSH; 1/7/2025 - BINC, NEAR; 1/8/2025 - JPLD, JSCP, PSH, VRIG; 1/9/2025 - SDSI; 1/10/2025 - GSST, LDUR; 1/11/2025 - CLOI

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