

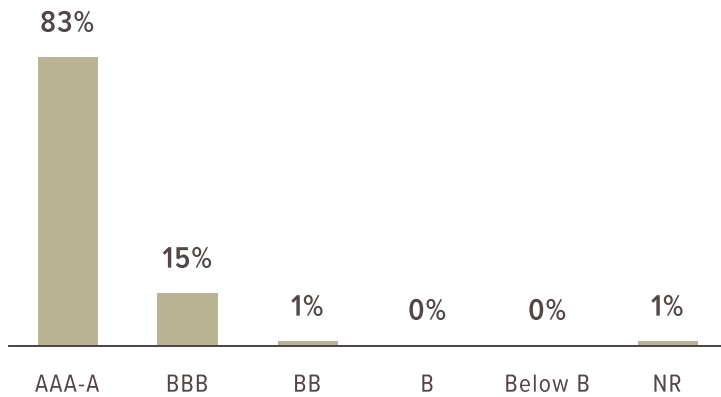
The Approach

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.

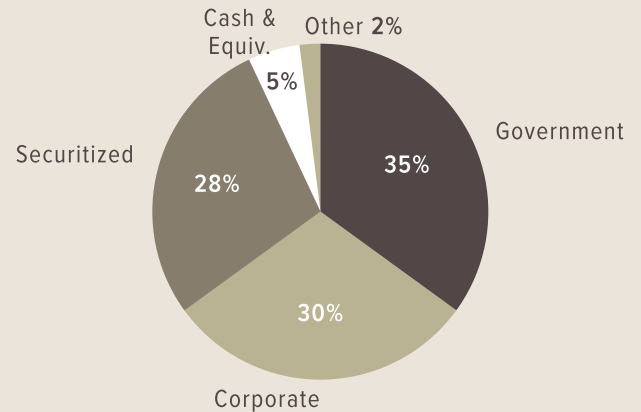
Credit Quality



Key Facts

Assets Managed — \$85 Million
 Holdings — 8
 Min Investment — \$10,000
 Benchmark — Barclays US Aggregate 1-3 Year Index

Allocation



Top 5 Holdings (% weight)

Vanguard Short Term Treasury ETF	19.5%
JP Morgan Short Duration Core Plus ETF	16.6%
Goldman Sachs Ultra Short Bond ETF	15.5%
Invesco Variable Rate Investment Grade ETF	15.4%
Janus Henderson Short Duration Income ETF	9.7%

Source: Addepar as of Dec. 2023; Bloomberg as of Dec. 2023; Morningstar as of Dec. 2023

Morningstar Portfolio Dates: 11/30/2023 - VGSH; 01/10/2024 - SLQD, STIP; 01/11/2024 - GSST, JSCP, LMBS, VNLA, VRIG

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